Commanding Officer
U.S. Coast Guard
Operations Systems Center
Kearneysville, WV 25430

Housing Management Information System (HMIS) User Guide

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Prepared By: QSS SETS Team, 408 Coast Guard Drive, Kearneysville, WV 25430

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1. SYSTEM OVERVIEW

This section provides a general overview of the Housing Management Information System (HMIS).

1.1 Introduction

HMIS is a Web-Based application used by the United States Coast Guard (USCG) to manage and track the activities of the Housing Program. It is available only via the Coast Guard Data Network (CGDN+) to authorized users.

1.2 Mandatory Use of HMIS

All Area Housing Offices (AHOs), Local Housing Offices (LHOs), and Unaccompanied Personnel Housing Offices (UPHs) shall use HMIS to track housing inventory and costs, occupancies and vacancies, and claims and inspections in accordance with provisions in this User Guide and *COMDTINST 11101.13C, CG Housing Manual*. Users at MLCPAC, MLCLANT, and Commandant (G-WPM-4) shall use the system to monitor costs, inventory, occupancies and vacancies and shall use the system to make management decisions on funding and inventory requests.

1.3 User Levels

The following user levels are provided for the levels of housing management.

Table 1-1 User Levels

User Level	Description
HQ	User level for G-WPM-4
MLC	User level for MLC Offices
AHA	User level for staffs of Area Housing Offices
LHA	User level for staffs of Local Housing Offices
HR	User level for Housing Representatives
UPH	User level for UPH Managers
UPHW	User level for Barracks Watch Standers

1.4 User Responsibilities

Table 1-2 provides an overview of the responsibilities of each user level.

Table 1-2 User Responsibilities

User Level	Responsibility
HQ	Monitoring costs, inventories, and utilization of assets
	Entering and updating Out of Pocket percentage
	Approving Owned Housing Diversions
MLC	Monitoring costs, inventories, and utilization of assets
AHA	Ensuring inventories of Leased, Owned, ISSA Housing and Barracks Facilities are accurate, complete and up-to-date
	Approving (or Not Approving) all housing units entered in HMIS by subordinate Local Housing Offices
	Converting the use of housing from family to unaccompanied and vice versa when requested and approved
	Entering and maintaining accurate, complete, and up-to-date Claim and Appeal information on Leased Housing Damage Claims
	Monitoring occupancies and vacancies of all housing units in HMIS
	Monitoring inspection data of all housing units in HMIS
	Creating and Printing Lease Modifications
	Printing Leases
	Using the HMIS Fiscal Year Renewal Process to process leases for Fiscal Year changeover
LHA	Ensuring inventories of Housing Facilities are accurate, complete, and up-to-date and notifying the Area Housing Office for correction when they are not
	Requesting "conversion" of units from the Area Housing Office
	Entering accurate, complete data for new Housing Units before requesting approval by the Area Housing Office
	Entering accurate and timely "move outs" of Housing Units
	Entering accurate and timely "move ins" of Housing Units
	Entering inspection data on Housing Units
	Entering and maintaining accurate, complete, and up-to-date Claim and Appeal information on Owned Housing Units
	Monitoring occupancies and vacancies of Housing Units in HMIS

User Level	Responsibility
HR	Entering accurate and timely "move outs" of Housing Units
	Entering accurate and timely "move ins" of Housing Units
	Entering inspection data on Housing Units
	Entering and maintaining claim data on owned housing units
	Monitoring occupancies and vacancies of Housing Units in HMIS
UPH	Entering/maintaining Barracks inventory, including # of rooms, designation of rooms & beds
	Entering accurate and timely "move outs" of beds
	Entering accurate and timely "move ins" of beds
	Monitoring occupancies and vacancies of the beds
All Users	Ensuring that data is accurate and up to date
	Running reports to validate and maintain system
	Notifying OSC Kearneysville in the event of problems

1.5 System Support and Maintenance

The HMIS system, which is a web-based application available on the CGDN+, is located at Operations Systems Center (OSC) Kearneysville, WV, under the ownership and control of the Housing Programs Division (G-WPM-4), Office of Military Personnel Management (G-WPM).

1.5.1 Getting Help

The Customer Services Division at the OSC provides system support for HMIS. Direct questions or problems to the HMIS Support Staff. Before calling, please have the following information available:

- All error codes received during the procedure
- All the procedures performed prior to the error condition
- Your unit Operational Facility (OPFAC)
- Your telephone number.

Please call from a telephone located beside your computer. In most cases, you will enter information or read from Standard Workstation screens. Contact Customer Services at (304) 264-2500 and request HMIS Support; or you may e-mail osc-hotline@osc.uscg.mil.

OSC Kearneysville cannot help you with “how to” procedure questions. Please refer first to this User Guide. If you cannot find the answer here, then contact your HMIS trainer. If you cannot find an answer from your HMIS trainer, then send an e-mail via your Area Housing Office to MLCpac or MLClant, and they will forward it on to the correct people.

1.5.2 User Name Requests & Training

G-WPM-4 provides user training for all authorized users and approves all user-name requests. Training is required prior to receiving a user name. Submit requests for user training to Commandant (G-WPM-4), Attn: HMIS Program Manager.

1.6 Logging onto HMIS

Only authorized users may log onto HMIS. Commandant (G-WPM-4) authorizes user name permissions.

Use the following procedures to log on to HMIS:

1.6.1 Open **Internet Explorer**.

1.6.2 In the address line, enter: **`hmis.osc.uscg.mil`** and press **ENTER**.

> *A Warning Screen appears in accordance with federal regulations. This screen warns against unauthorized access or use of this program.*

1.6.3 Click **LOGIN**.

1.6.4 Enter: **`padloc\`***username* on first line. Enter: *password* on second line.

1.6.5. Click **OK**.

NOTE: *You have three 3 chances to Logon successfully; after three invalid logon attempts, you are locked out of the system for 30 minutes.*

1.7 HMIS Menu Structure

HMIS Menus are structured according to function. The following provides a brief look at the menu structure and the functions found within each selection:

Table 1-3 HMIS Menu Structure

Menu Item	Functions Available
Housing Unit Management	Search for Housing Units
	Search for the History of Housing Units
	Add/Copy/Delete/Update/Convert/Divert a Housing Unit
	Add/Modify Damage Claims
	Add/Modify Tenant Damage Claim Appeals
	Add/Modify Lessor Damage Claim Appeals
	Add/Modify Inspections
	Print Leases

Menu Item	Functions Available
Housing Unit Management (continued)	Create & Print Lease Modifications
	Occupy a Housing Unit
	Vacate a Housing Unit
Personnel/Applicant Information Management	Search for personnel
	View personnel records
	Add Non-Coast Guard personnel
	Create applications for Housing
Reports	Run all HMIS reports
UPH Management	Add/Update/Delete Barracks
	Add/Update/Delete Barracks Rooms and Beds
	Add Barracks Rooms Furnishings
	Add/Delete Damage Claims
	Add/Delete Damage Claim Appeals
	Run UPH Reports
Fiscal Year Renewal Process	Create Fiscal Year Modifications
	Create Fiscal Year Leases
	Update HMIS at beginning of Fiscal Year
	Generate FINCEN-required Fiscal Year Reports
System Admin	Update site information – including current Leased Housing Contracting Officer, unit address, and telephone number
	Maintain out of pocket %
	Maintain subordinate units within AOR
	Change passwords

NOTE: *If system downtime is imminent, a scrolling message will appear on the HMIS Main Menu. Please follow any instructions contained therein.*

2. SYSTEM ADMINISTRATION

The option for System Administration is found on the HMIS Main Menu. The System Administration Menu contains three options: **Site Management**, **Change Password**, and **Return to Main Menu** (see Figure 2-1). **Site Management** identifies User Sites (both parent and subordinate sites) data fields for creating lease contracts and modifications. Site Management criteria are linked to Username criteria; if the two do not match, then Usernames may not work correctly. **Change Password** allows users to change their passwords. Users are required to change password immediately after training and every 180 days thereafter.

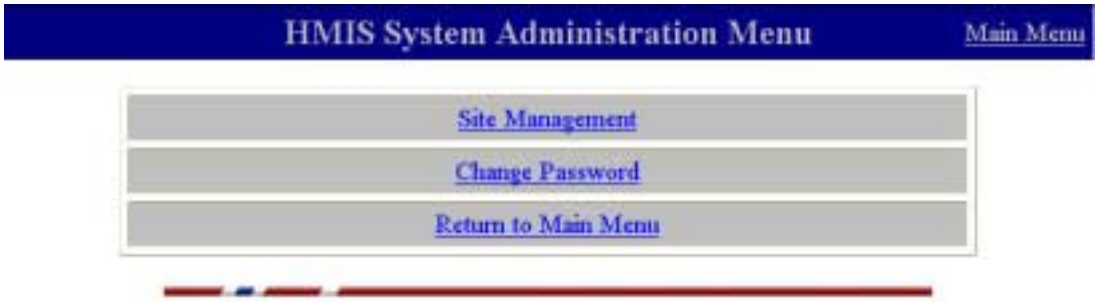


Figure 2-1 System Administration Menu

2.1 Updating Site Management

Site Management identifies User Sites (both parent and subordinate sites) data fields for creating lease contracts and modifications. Site Management criteria is linked to Username criteria; if the two do not match then Usernames may not work correctly. Upon initial Site Set-Up, users must ensure that data on the Site Page is correct.

Site Management contents will vary depending on the site. Certain fields may be updated at each site. This section provides instructions on updating Site Management. Those items not mentioned may not be updated. If corrections need to be made, contact G-WPM-4 or OSC Hotline.

Figure 2-2 Site Management Screen

NOTE: *Field definitions are provided in* Appendix A, Site Management Fields.

To update the information on the Site page, use the following procedures:

2.1.1 For each field that requires updating, enter the correct information.

2.1.2. Click **Save**.

The following areas require close attention when updating Site Management:

- **Site No** must be correct at the AHO Level; if changed at the LHO level, there is no impact as leases and lease modifications get information from the AHO site.
- **Program Element** can only be changed at the AHO site; it must be accurate or leases and lease modifications print incorrectly.
- **Current Fiscal Year** should be updated at AHO level.
- **Contracting Officer** must be correct at the AHO level only.
- **Site Address & Telephone** must be correct at the AHO level for accurate printing of leases and lease modifications.
- **Maximum Funding Level** may be updated by anyone but must be accurate for the Maximum Funding Report to print accurately.

2.2 Adding Subordinate Site

If and when a new LHA, HR, or UPH site is created, a subordinate site must be added. Not everyone can add a subordinate site. Table 2-1 lists user type privileges:

Table 2-1 Privileges for Adding a Subordinate Site

Adding Subordinate Sites	AHO	LHO	HR	HQ
Add a new AHA				X
Add an MLC				X
Create a subordinate LHA	X			X
Create a subordinate HR associated with an LHA	X	X		X
Create a subordinate UPH associated with an AHA	X			X
Create a subordinate UPH associated with an LHA	X	X	X	X

Perform the following steps to add a Subordinate Site (following the privileges above):

2.2.1 Click **System Administration**.

2.2.2 Click **Site Management**.

2.2.3 Perform one of the following:

Table 2-2 Instructions for Adding a Subordinate Site

If you are adding…	Then…
LHA	1. Click **Add Subordinate Unit**. 2. Click **Site Type as LHA**. 3. Complete the data entry for LHA site. 4. Click **Save**.
HR	1. Click **List Subordinate Units**. 2. Locate the LHA that the HR is assigned to. 3. Click on the LHA site. 4. Click **Add Subordinate Unit**. 5. Click **Site Type as HR**. 6. Complete the data entry for HR site. 7. Click **Save**.
UPH responsible to AHA	1. Click **Add Subordinate Unit**. 2. Click **Site Type as UPH**. 3. Complete the data entry for UPH site. 4. Click **Save**.
UPH responsible to LHA or HR	1. Click **List Subordinate Units**. 2. Locate the LHA or HR the UPH is assigned to. 3. Click on the site. 4. Click **Add Subordinate Unit**. 5. Click **Site Type as UPH**. 6. Complete the data entry for UPH site. 7. Click **Save**.

2.3 Changing HMIS Password

Users are required to change password immediately after training, every 180 days thereafter, and anytime prompted by the system. The following rules apply to creating a new password:

- Must contain at least eight characters
- Must contain one uppercase letter
- Must contain one lowercase letter
- Must contain one number.

Perform the following steps to change your password:

2.3.1 Click **System Administration**.

2.3.2 Click **Change Password**.

2.3.3 Enter your *Old Password*.

2.3.4 Enter your *New Password*.

2.3.5 Confirm your *New Password*.

2.3.6 Click **Save**.

3. HOUSING UNIT OVERVIEW

The housing unit screens are used to enter descriptive information for the inventory of leased, owned, or Interservice Standard Agreement (ISSA) units. The screens change according to the type of housing being entered or displayed. Housing unit information is displayed and entered using three tabs (see Figure 3-1), each one containing different information related to the housing unit:

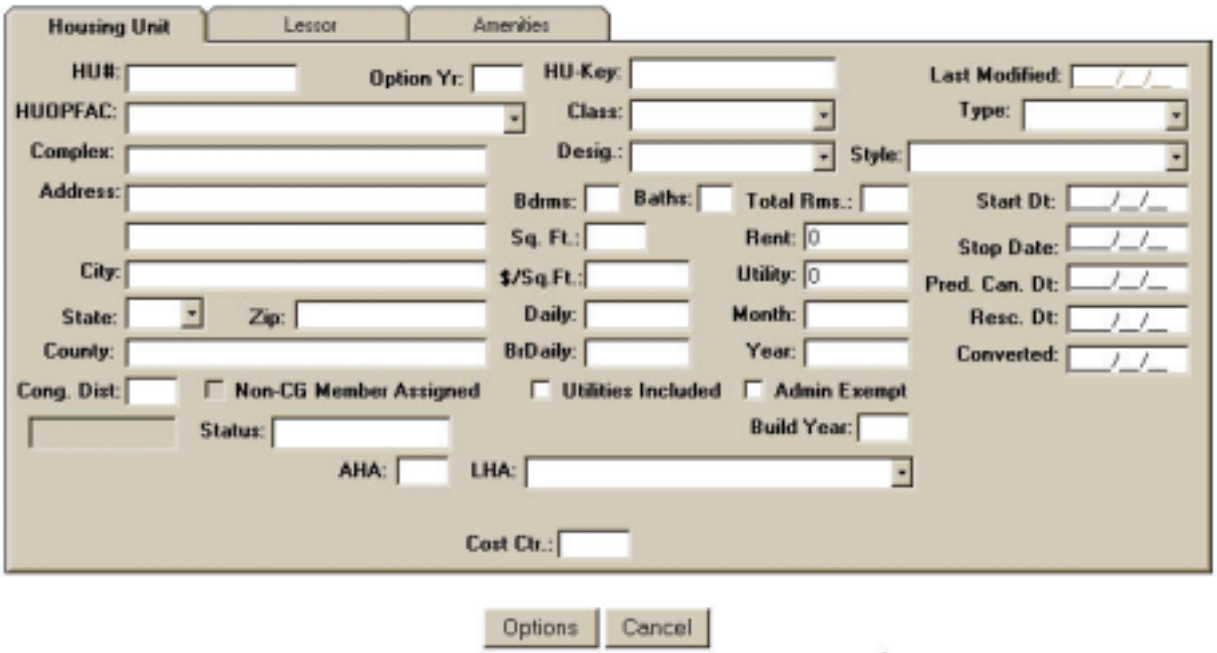


Figure 3-1 Housing Unit Tabs

Depending on the type of housing (leased, owned, or ISSA), some fields are not visible to the user. For example, **Environmental Assessment Date** is not available for a Lease unit, Lessor information is not available for an owned house, and Diversion information is not available for a Lease.

An example of the **Housing Unit** tab for both a leased and an owned house is displayed in Figures 3-2 and 3-3, respectively. Note the differences.

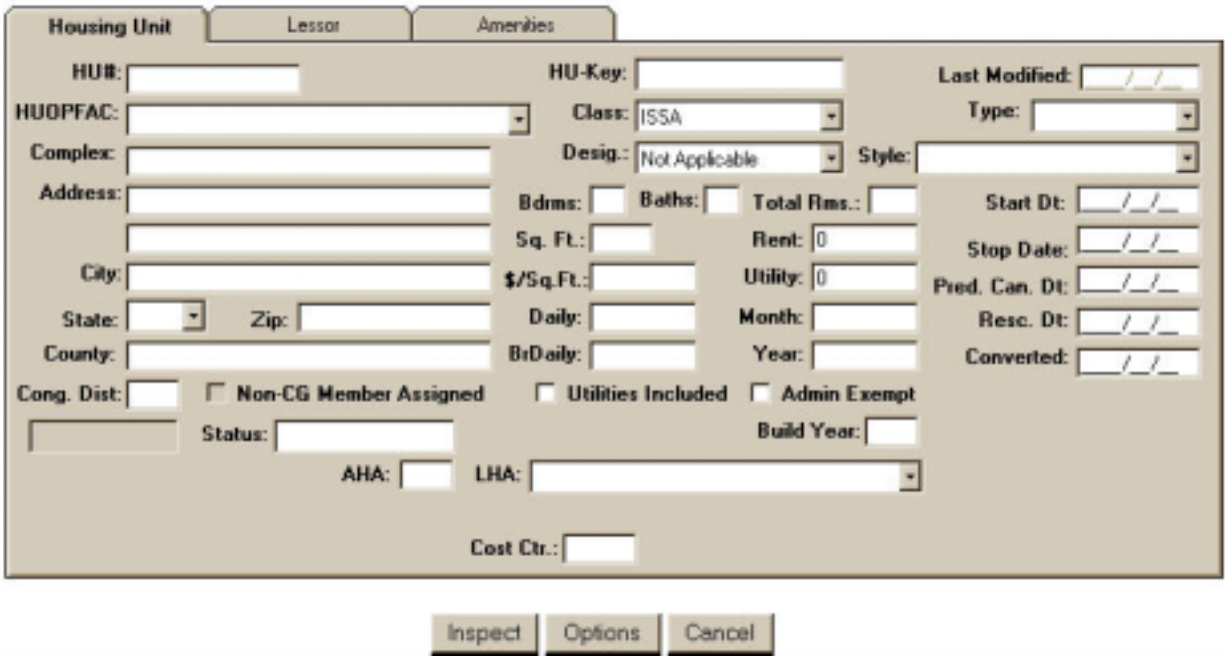


Figure 3-2 Leased or ISSA Housing Unit Screen

Notice that all three tabs appear normal in a leased or ISSA house.

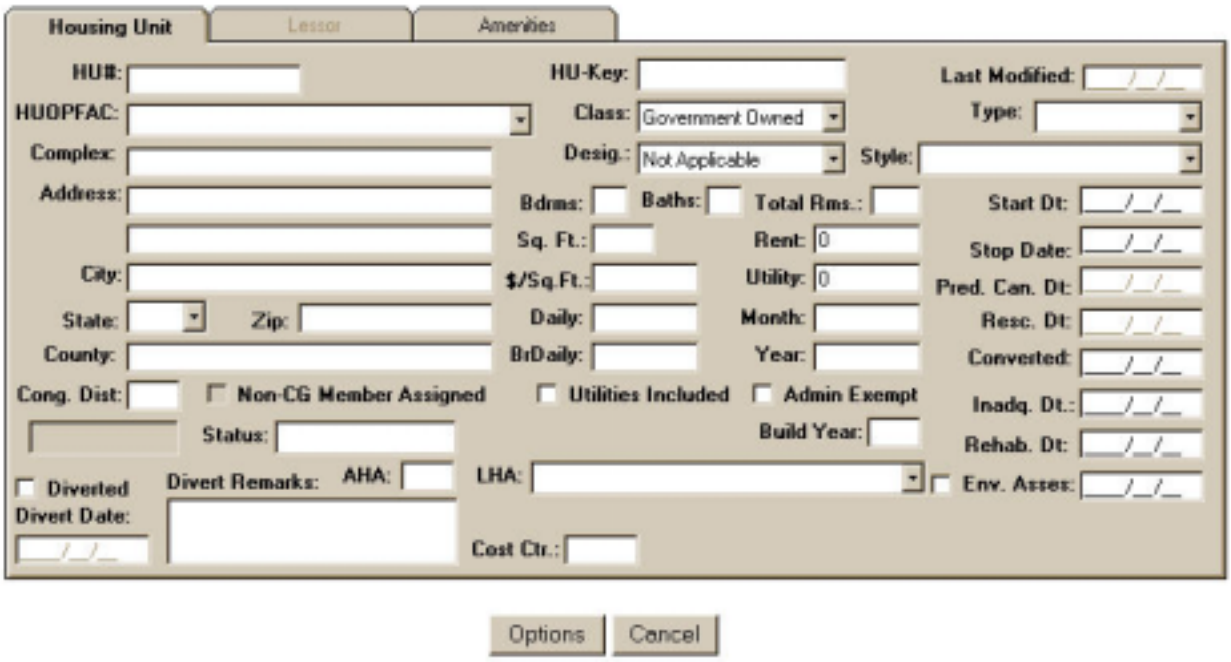


Figure 3-3 Government Owned Housing Unit Screen

Notice that the **Lessor** tab is grayed out in an owned house. Notice the addition of the following fields:

- **Diverted**
- **Divert date**
- **Divert Remarks**
- **Inadq. Date**
- **Rehab. Dt**
- **Env. Assess**
- **Cost Ctr**.

3.1 Lessor Tab

The **Lessor** tab (see Figure 3-4) is used to enter descriptive information for leased and ISSA housing. Using the information contained on this screen, HMIS automatically creates the lease contract and lease modifications.

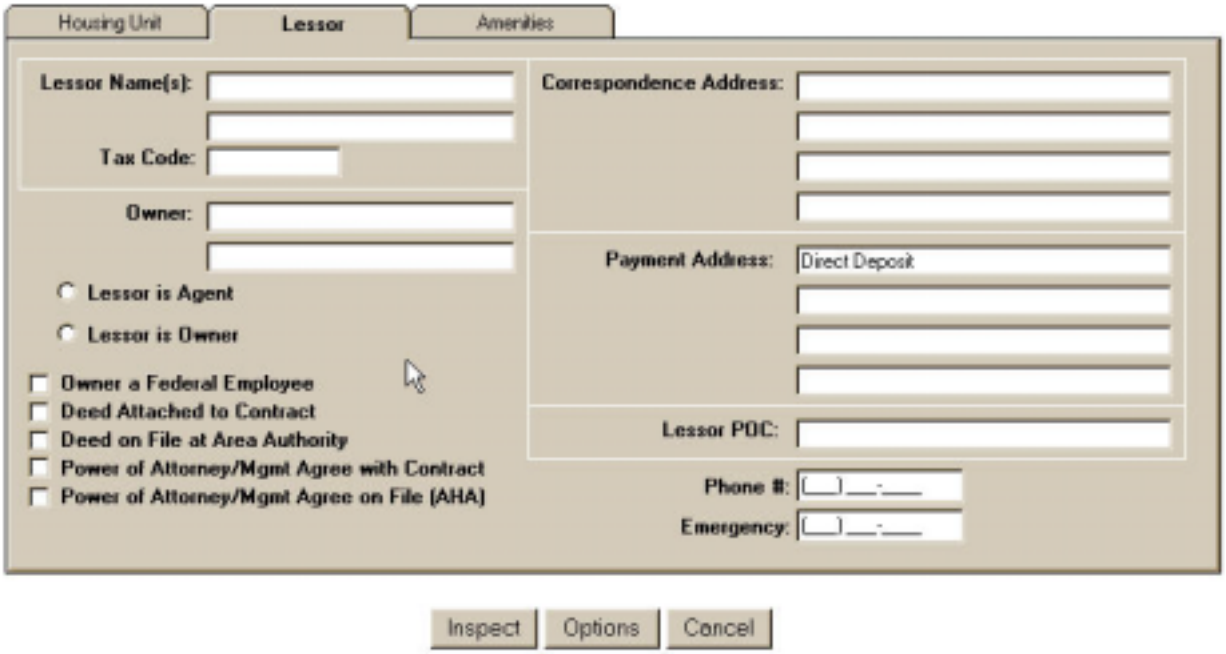


Figure 3-4 Lessor Tab

NOTE: *A complete description and definition of the lessor fields is provided in* Appendix B, Housing Unit Fields.

3.2 Amenities Tab

The **Amenities** tab (see Figure 3-5) is used for all types of housing: leased, owned, and ISSA. Some information from this page is used to create the lease contract.

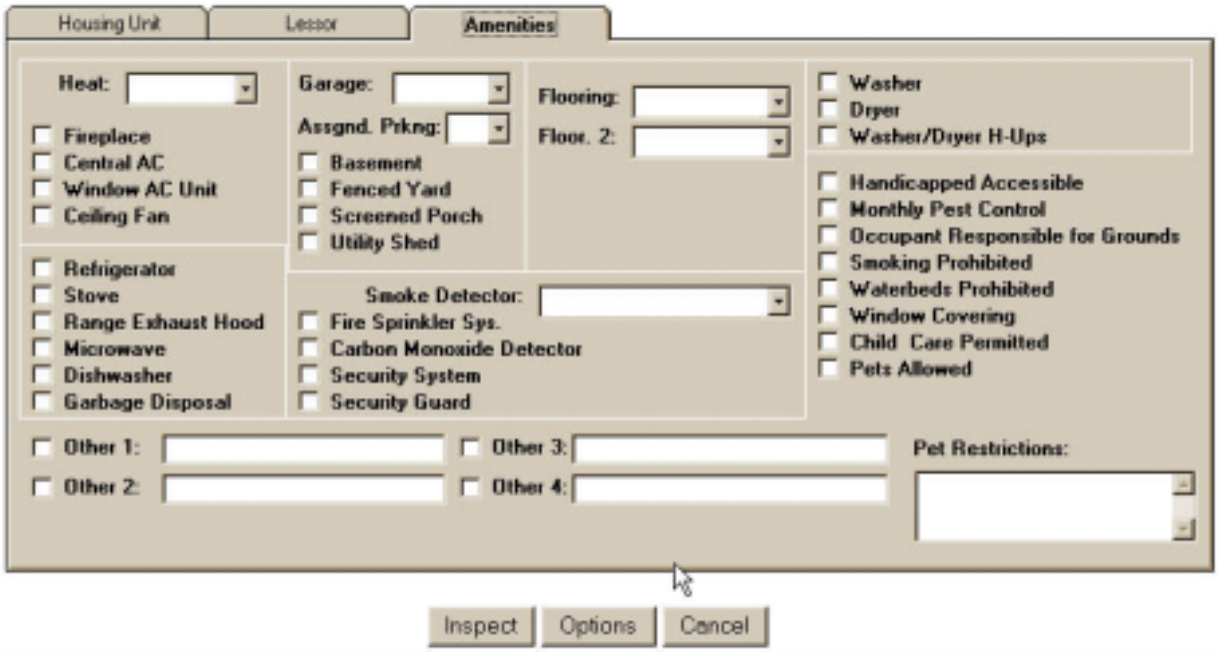


Figure 3-5 Amenities Tab

NOTE: *A complete description and definition of the amenity fields is provided in* Appendix B, Housing Unit Fields.

3.3 Adding a Housing Unit to the Inventory

HMIS contains current inventory of Owned, Leased, and ISSA Housing. As needed, additional housing units are acquired and must be entered into HMIS. Upon initial data entry, all records are NOT APPROVED, preventing any unwanted or unauthorized housing units to be counted as part of the inventory. For the housing unit to become part of the inventory and to allow it to be occupied, the steps illustrated in Figure 3-6 must be followed. The AHO, LHA, and HR are responsible for entering accurate, and complete data for new Housing Units, however only the AHO gives the final approval.

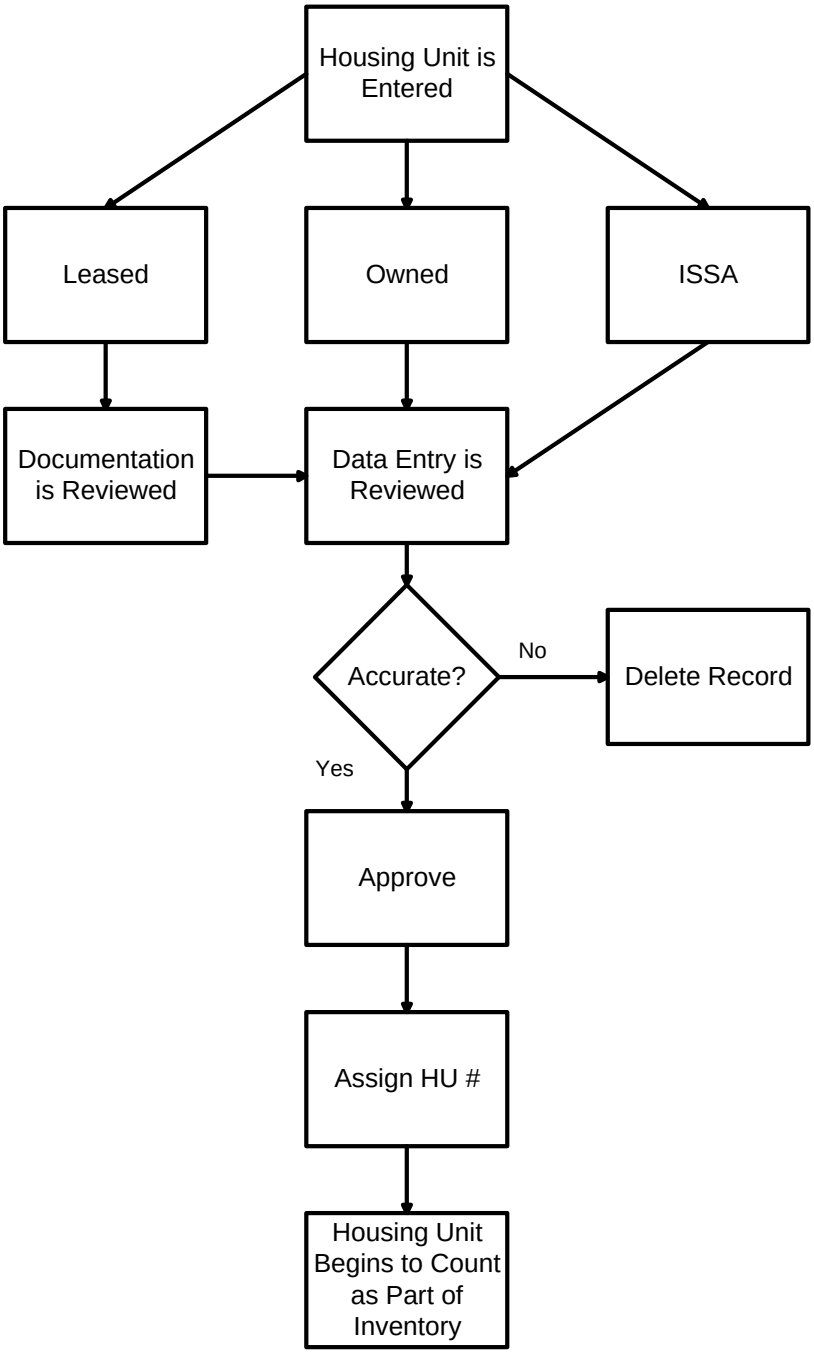


Figure 3-6 Adding a Housing Unit to the Inventory

AHO, LHO and HR users may add a house. Perform the following steps, *using Appendix B, Housing Unit Fields* as a reference, to add a house:

3.3.1 Click **Housing Unit Management**.

3.3.2 Click **Active House/Lease Information**.

3.3.3 Click **Add New Housing Unit**.

3.3.4 For a Leased Housing Unit, select **Leased** from the Class drop-down list, and enter all required fields for a leased house.

3.3.5 For an Owned Housing Unit, select **Owned** from the Class drop-down list, and enter all required fields for an owned house.

3.3.6 For an ISSA Housing Unit, select **ISSA** from the Class drop-down list, and enter all required fields for an ISSA house.

3.3.7 When finished, click **SAVE**.

4. PERSONNEL/APPLICANT/WAITNG LISTS

Before any person can occupy a housing unit, the person must be contained in HMIS. All Active Duty USCG personnel information is contained in HMIS and is updated once a week by OSC Kearneysville System Support. Because of this, users must add non-USCG Personnel [Department of Defense (DOD), Civilian, and USCG Reservists] for the purposes of housing assignments.

The Personnel Information screen is provided to allow you to either view Active Duty USCG information relevant to housing assignments or to allow you to enter non-USCG Active Duty personnel into HMIS.

The screen is divided into three tabs: **Personnel Information**, **Current Application/Residence Information**, and **Application/Waiting List Information** (see Figure 4-1).

Refer to *Appendix C, Personnel and Applicants Fields*, for field definitions of the fields that appear on the Personnel Screen.

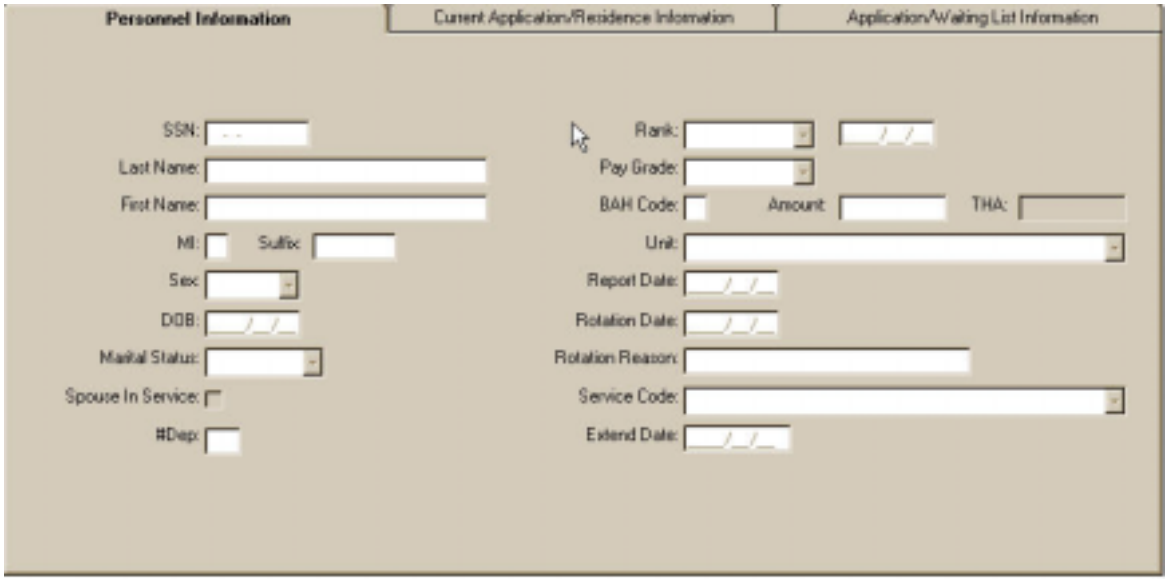


Figure 4-1 Personnel Screen

4.1 Application/Waiting List Information

After ensuring the person is in HMIS, users must create an application within HMIS. An application must be created for all permanent party type housing (Owned, Leased, ISSA, and Permanent Party Barracks).

The Application/Waiting List Information screen (see Figure 4-2) is provided to allow you to enter Application/Waiting List information for those persons applying for or being placed in housing. Once this is completed, you may place the person in a housing unit. If you complete a housing application and do not immediately place him/her into housing, the applicant will show up on a waiting list. All references to this section assume the member will be placed on a waiting list.

Refer to *Appendix C, Personnel and Applicant Fields*, for field definitions of the fields that appear on the Application/Waiting List Information Screen.

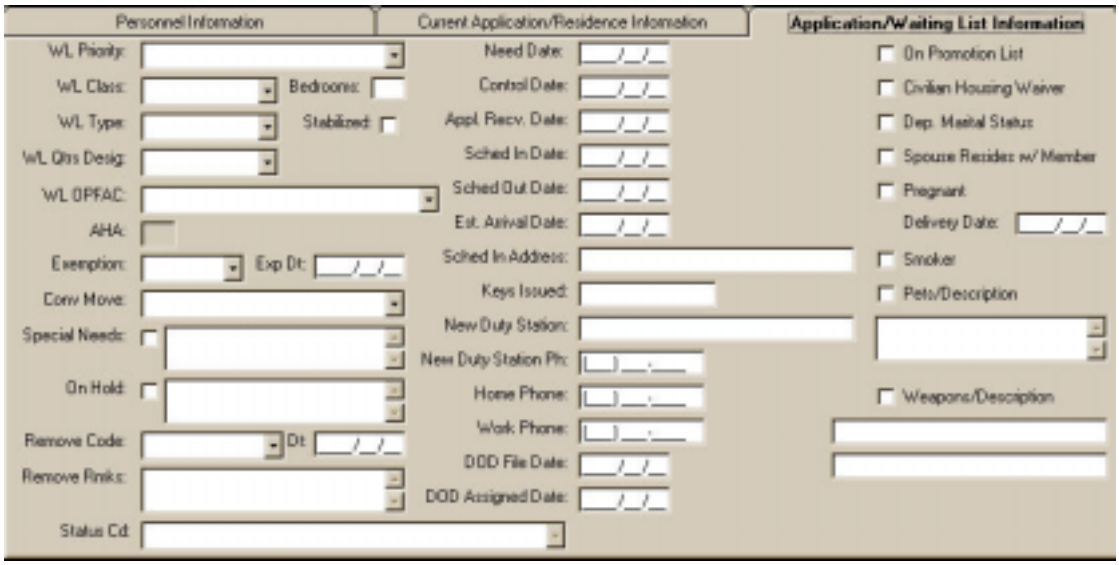


Figure 4-2 Application/Waiting List Information Screen

4.2 Current Application/Residence Information

After an application has been created for a member, and that member has been placed in housing, the Application/Waiting List Information is transferred to the **Current Application/Residence Information** tab (see Figure 4-3). At that time, the Application/Waiting List Information data is removed. This shift is provided to allow the user to find the exact address a member is assigned to and to allow the member, upon receipt of the next Permanent Change of Station (PCS) orders, to be placed on a waiting list for another location. This screen is particularly useful if you are trying to place this member in housing and the system indicates he/she is already in housing. From this screen you can locate the House, find the LHO, and notify the LHO that this member should be moved from that housing.

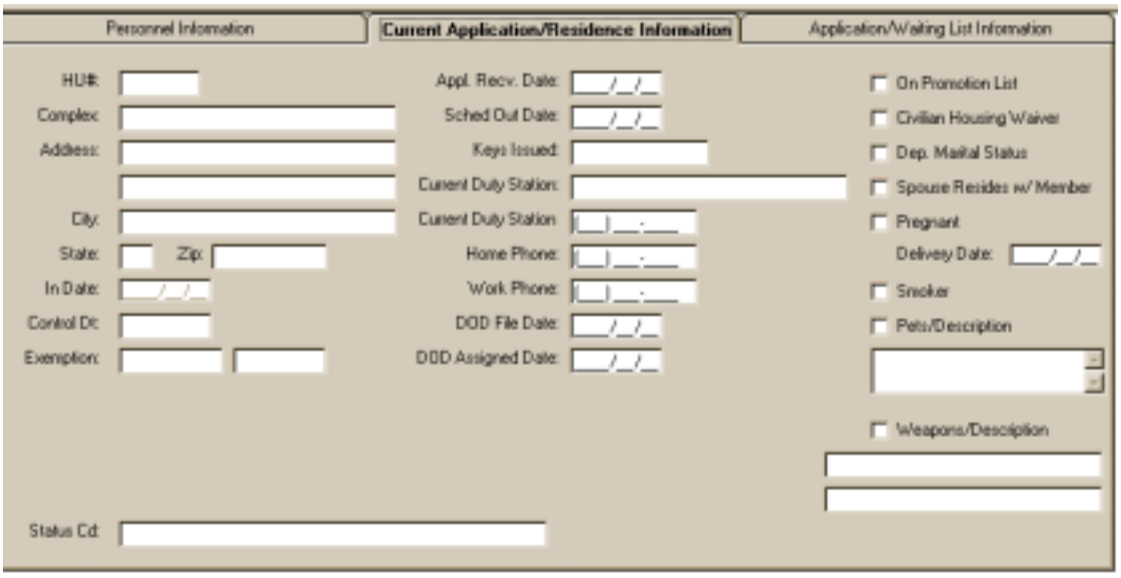


Figure 4-3 Current Application/Residence Information Screen

4.3 Adding a Person

All Active Duty USCG personnel information is contained in HMIS and is updated once a week by OSC Kearneysville System Support. Because of this, users may only add non-USCG Personnel for the purposes of housing assignments.

As a user, you cannot add a non-USCG unit. For this reason, when entering a non-USCG person to HMIS, use the Allotment Target Unit (ATU) and OPFAC of the housing office.

If a USCG Active Duty person is not found in the system, call the OSC Hotline at (304) 264-2500.

Perform the following steps to add a non-USCG Person. Only those fields listed are required, but all may be entered.

4.3.1 Click **Personnel/Applicant Information Management** from the Menu.

4.3.2 Click **Add New Person**.

4.4.3 Enter the following information pertaining to the person:

- *SSN*
- *Last Name*
- *First Name*
- *Sex*
- *Number of Dependents*
- *Rank*
- *Paygrade*

- *Unit*
- *Service Code*.

4.3.4 Click **Save.**

4.4 Creating an Application/Putting a Person on a Waiting List

This section provides instructions to create an application or put a person on a waiting list. These terms are used interchangeably. This step is required before a person can occupy a housing unit within HMIS. A member can live in one housing unit and have only one additional application. This allows for those persons still in housing in one duty station to submit an application for housing in another duty location.

Housing applications should be entered into HMIS as soon as the gaining housing office receives them.

Perform the following steps to create an application or put a person on a waiting list.

4.4.1 Click **Personnel/Applicant Information Management** from the Menu.

4.4.2 Click **Personnel Search**.

4.4.3 In the Search By field, select either **SSN or ID of Personnel** or **Last Name**, and populate the Matching field.

4.4.4 Click the **Search** button.

The Personnel Search by SSN of Occupant screen or the Personnel Search by Last Name of Occupant screen appears.

4.4.5 Click to the link for the person.

The Personnel Information Screen appears.

4.4.6 Click the **Application/Waiting List Information** tab.

4.4.7 Enter the data for the following required fields following the rules listed below.

- **WL OPFAC**
- **WL CLASS (Housing Type)**
- **WL TYPE (Housing Type)**
- **Bedrooms**
- **Need Date**
- **Control Date**
- **Application Received Date**.

The application page MUST match the housing unit that the member is being placed in. Rules are as follows:

- The Waiting List OPFAC must match the LHO OPFAC of the Housing Unit.
- The Housing Class must match (for example: leased on waiting list - member only can be placed in leased unit).
- The Housing Type must match (for example: Family Type on the Waiting List - member is only eligible for a Family Type Housing Unit).
- Bedroom number of Application must match the Number of Bedrooms of housing unit.
- EXCEPTION: Unaccompanied application should always state ONE bedroom.

NOTE: *Although not required to occupy a house, each of the other fields should be entered if they apply. Each of them provides data for various reports.*

4.4.8 Click **Save**.

5. HOUSING UNIT FUNCTIONS

After a Housing Unit and an Applicant have been added to HMIS, there are a host of other functions that must be performed in HMIS, including but not limited to Occupying and Vacating a Housing Unit.

This section provides those functions that are required to maintain the occupancy and inventory of HMIS.

The following topics are included in this section:

- Searching for a House
- Updating an Unapproved House
- Approving a Housing Unit
- Updating an Approved House
- Entering Pre-Lease and Other Inspections
- Occupying a Housing Unit
- Vacating a Housing Unit
- Entering Occupant Inspections
- Entering a Check Out Inspection on an Owned Housing Unit
- Copying a Housing Unit
- Converting a Housing Unit
- Diverting a Housing Unit
- Removing an Excess Owned Housing Unit
- Deleting a Housing Unit.

5.1 Searching for a Housing Unit

You may search for a house using the following options or combinations of options:

- Address
- City
- Complex Name
- HU# (or Lease #)
- HU-Key
- Open Claims
- SSN of Occupant
- Style of Housing Unit
- Tax ID of Lessor
- Last Name of Occupant
- Unapproved Status
- Vacant Units
- Zip Code
- Number of Bedrooms
- Lessor of Housing Unit.

These searches can be used in conjunction with Type or Class, as well as a specific geographic area.

Perform the following steps to search for a housing unit:

5.1.1 Select **Housing Unit Management** from Main Menu.

5.1.2 Select **Active House / Lease Information**, and then select **Search / Modify Existing Housing Unit**.

The House Search Screen appears (see Figure 5-1).

Figure 5-1 House Search Screen

5.1.3 Using the list-box, select the method you want to Search For.

5.1.4 Enter matching criteria or leave blank.

5.1.5 Add more specifics using *Type* or *Class*.

5.1.6 Select the specific area you want to Search In, or select **All of Housing**.

5.1.7 Click **Search**.

The resulting pages will provide links using the criteria you searched.

5.1.8 Press on the link to go the housing unit.

5.2 Updating an Unapproved House

Once a housing unit is entered and saved in HMIS, the person who entered it or the appropriate AHO may update most of the fields.

The fields that cannot be updated or changed are:

- **Bedrooms**
- **LHA**
- **HUOpfac**.

Perform the following steps to update an unapproved housing unit:

5.2.1 Search for the housing unit.

5.2.2 Click on the link to the house you want to update.

5.2.3 Update the fields that need to be changed.

5.2.4 Click **Save**.

5.3 Approving a Housing Unit

As needed, additional housing units are acquired and must be entered into HMIS. Upon initial data entry, all records are not approved, preventing any unwanted or unauthorized housing units to be counted as part of the inventory. Housing units that are not approved may not be occupied.

The approval process adds the housing unit to the inventory and changes the status to ACTIVE, allowing the unit to be occupied.

Perform the following steps to approve a housing unit:

5.3.1 Search for the housing unit by *Address* or *Unapproved* status.

5.3.2 Click on the link to the house you want to approve.

NOTE: *Notice that the housing unit is Not Approved.*

5.3.4 Review all three tabs, updating as necessary.

5.3.5 Click **Approve** on the **Housing Unit** tab.

5.4 Updating An Approved House

Once a housing unit is entered and saved in HMIS, AHO, LHO and HR users may update it. Once the unit is approved, the LHO and HR users may only update the following fields:

- **Congressional District Code**
- **Vacancy Reason**
- **Divert Checkbox & Remarks on an Approved Housing Unit**.

Perform the following steps to update these three fields:

5.4.1 Search for the housing unit.

5.4.2 Click on the link to the house you want to update.

5.4.3 Update the **Congressional District** code.

5.4.4 Update the **Divert** checkbox and enter remarks to **Request Diversion**.

5.4.5 Click **Save**.

5.4.6 Click **Options** at the bottom of the screen.

5.4.7 Click **Bedroom/Occupant** from the next menu.

5.4.8 Click on the down arrow to select the appropriate **Vacancy Reason** (see Figure 5-2).

Figure 5-2 Vacancy Reason Option List

5.4.10 Click **Save**.

5.5 Entering Pre-Lease and Other Inspections

Pre-Lease Inspections can only be entered prior to being occupied; the 'Other' inspection may be entered whether the housing unit is occupied or not. Entering the Pre-Lease inspection prior to occupancy allows the record to remain with the housing unit throughout the life of the lease. The 'Other' inspection allows for those cases when a vacant owned housing unit requires an inspection prior to assignment to the next occupant for special purposes.

Perform the following steps to complete either the Pre-Lease Inspection or 'Other' Inspection information on a housing unit:

5.5.1 Search for the housing unit you want to inspect.

5.5.2 Click **Inspect** from the choices at the bottom of the screen.

5.5.3 Click **Enter New Inspection**.

5.5.4 Click **New Inspections**.

The Inspections screen appears (see Figure 5-3).

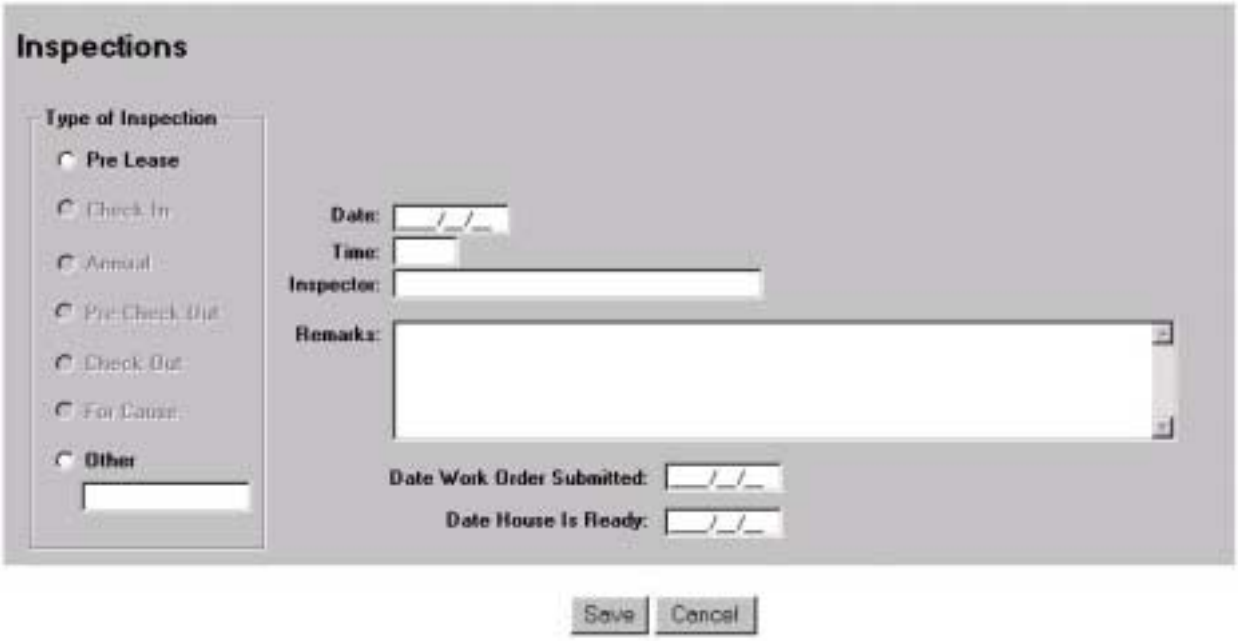


Figure 5-3 Inspections Screen

5.5.5 Click on either **Pre Lease** or **Other**.

5.5.6 Enter the *Date* of the inspection.

5.5.7 Enter the *Time* of the inspection.

5.5.8 Enter the full name and rank/grade of the inspector.

5.5.9 Enter any appropriate inspection remarks.

5.5.10 Click **Save** or click **Cancel** to return to the **Housing Unit** tab.

5.6 Occupying a Housing Unit

This section provides instructions to occupy a housing unit. Remember that an application must have been created for the person and that only an approved housing unit can be occupied.

As soon as possible after an occupant is checked into Housing, HMIS data entry should be entered to ensure real-time validity of system and occupancy/vacancy management. No more than two days should lapse.

Perform the following steps to occupy a housing unit:

5.6.1 Search for the housing unit.

5.6.2 Click on the link to the housing unit.

5.6.3 Click **Options**.

5.6.4 Click **Bedroom Occupant**.

NOTE: *If the housing unit is unaccompanied, first select the Bedroom number that you want to occupy.*

5.6.5 Click **Applicant Search**.

5.6.6 Click **Search**.

A list of applicants appears.

5.6.7 Select the applicant that you are placing in the housing unit.

Once selected, the applicant information will be transferred to the Housing Unit Occupant screen.

5.6.8 Enter the *In Date*.

5.6.9 Click **SAVE**.

CAUTION: Once you click SAVE**, you cannot change the *In Date*. Make sure this date is correct before clicking** SAVE**.**

5.6.10 Enter *Check In Inspection Information* (see Section 5.8, Entering Occupant Inspections Instructions).

5.7 Vacating a Housing Unit

This section provides instructions to vacate a housing unit. As soon as possible after an occupant is checked out of Housing, HMIS data entry should be entered to ensure real-time validity of the system and occupancy/vacancy management. No more than two days should lapse. Prior to performing this step, check out inspections must be completed.

Perform the following steps to vacate a housing unit:

5.7.1 Search for the housing unit.

5.7.2 Click on the link for the housing unit you wish to vacate.

5.7.3 Click **Options**.

5.7.4 Click **Bedroom Occupant**.

NOTE: *If the housing unit is Unoccupied, first select the Bedroom number that you wish to vacate.*

5.7.5 Enter the *Out Date* (the date the member actually moved out of housing; this cannot be in the future).

5.7.6 Enter the reason why the housing unit may remain vacant. Select from the following choices, which include choices appropriate for Owned, Leased, and Barracks. These choices are critical to management of vacancy, so make sure you select the appropriate reason.

- Male Unaccompanied Bed/Bedroom Vacant
- Female Unaccompanied Bed/Bedroom Vacant
- Awaiting PCS Member
- Reserved for Member Already Onboard
- Lease being Canceled
- No Eligible Applicants
- Damage Assessment or Renovation
- Inadequate
- Major Repairs or Renovations
- Reserved for Key/Essential Personnel
- Diverted to UPH
- Diverted to Other Use (enter remarks to explain)
- Awaiting Entry Approval
- New Lease
- Change of Occupancy Maintenance.

5.7.7 From the following choices, select the reason why the member is moving out:

- Lease Discontinued
- Death of Member
- Convenience Move, Member Request
- Phase Out
- PCS
- Loss of Dependents
- Convenience Move, Government
- Abandon Inadequate
- Service Separation
- Member Request
- Request Eviction.

5.7.8 Enter the *Out Date*.

5.7.9 Click **Vacate** to clear the quarters, or click **Cancel** if you do not want to clear quarters.

5.8 Entering Occupant Inspections

This section provides instructions for adding inspections for housing units that are occupied. Five types of inspections may be entered: Check In, Annual, Pre-Check Out, Check Out, and For Cause. The Check In and Check Out Inspections must be entered before an Occupant can be Vacated. Inspection information should be entered as quickly as possible after completed to maintain integrity and validity of HMIS data.

Perform the following steps to add an inspection:

5.8.1 Search for the housing unit.

5.8.2 Click on the link for the appropriate housing unit.

5.8.3 Click **Options**.

5.8.4 Click **Inspections**.

5.8.5 Click the link to the person

5.8.6 Click **New Inspection**.

5.8.7 Click the appropriate type of inspection.

5.8.8 Enter the following information:

- Date of the Inspection
- Time of the inspection (24 Hour Clock)
- Name of the inspector (full name and rank/grade, not initials)
- Any appropriate inspection remarks.

5.8.9 Click **Save** to save the inspection, or click **Cancel** to return to the **Housing Unit** tab.

5.9 Entering a Check Out Inspection on an Owned Housing Unit

This section provides instructions to add Check Out Inspections for owned housing units. The Check Out Inspection for an owned housing unit provides additional fields to track the time when the unit was turned over for maintenance and when it was returned. This information will print on the Weekly Working Report and the Units Available Report.

Perform the following steps to add a Check Out Inspection for an owned housing unit:

5.9.1 Search for the housing unit.

5.9.2 Click on the link to the appropriate housing unit.

5.9.3 Click **Options**.

5.9.4 Click **Inspections**.

5.9.5 Click the link to the person.

5.9.6 Click **New Inspection**.

5.9.7 Click **Check Out Inspection**.

5.9.8 Enter the following information:

- Date of the Inspection
- Time of the inspection (24 Hour Clock)
- Name of the inspector (full name and rank/grade, not initials)
- Any appropriate inspection remarks.

5.9.9 Enter this additional information:

- Date Work Order is Submitted to FED, contractor or maintenance staff to perform change over maintenance
- Date House is Ready (enter the appropriate agreed upon length of time for COM to be completed. For example, if five working days are required, enter a date that reflects 5 working days from the date the work order will be submitted).

5.9.10 Click **Save** to save the inspection, or click **Cancel** to return to the **Housing Unit** tab.

5.10 Copying a Housing Unit

Copying a housing unit instead of retyping will save the user time. Housing units may be copied at the AHO, LHO, and HR site. The resulting housing unit is not approved at any user level.

Perform the following steps to copy a housing unit:

5.10.1 Search for the housing unit you want to copy.

5.10.2 Click **Copy**.

The resulting house is returned with HU# left blank. All other fields copy over.

5.10.3 Enter a new *HU#*.

5.10.4 Change the *Address*.

5.10.5 Change the *Rent* and *Utilities*.

5.10.6 Make any additional changes as necessary.

5.10.7 Click **SAVE**.

5.11 Converting A Housing Unit

A housing unit is converted when the use of it changes from a family type to an unaccompanied type or vice versa. Both leased and owned housing units may be converted.

Three rules apply to conversion of housing units:

- Only a vacant housing unit can be converted.
- Only an AHO can convert a housing unit.
- Owned housing conversion requires COMDT(G-WPM-4) approval.

Perform the following steps to convert a housing unit:

5.11.1 Search for the housing unit you wish to convert.

NOTE: *Make sure that the housing unit is vacant.*

5.11.2 Enter in the date that the Conversion takes place in the **Converted Date** field.

5.11.3 Click **Convert**.

The resulting housing unit now has a Converted Date, the Type has changed, and it has an Active Status.

NOTE: *The house, with its former type, has a Converted Status Code and may be viewed only.*

5.12 Diverting a Housing Unit

Three rules apply when diverting a housing unit:

- An AHO or LHO can request diversion of an approved housing unit.
- The HMIS process does not take the place of the formal request for diversion IAW Housing Manual.
- All HMIS processed requests for diversions should have appropriate HMIS remarks.

Perform the following steps to request to divert a housing unit:

5.12.1 Search for the vacant housing unit.

5.12.2 Click on the link to the house you wish to divert.

5.12.3 Click the **Divert** checkbox.

5.12.4 Enter *Remarks* concerning the diversion request, including the effective date of diversion.

5.12.5 Click the **SAVE** button.

> *Upon receipt of diversion request AND diversion approval, COMDT (G-WPM-4) will enter the diversion date and a stop date. The housing unit will no longer be available for editing, viewing, or occupying.*

5.13 Removing an Owned Housing Unit

If an owned housing unit is declared inadequate and is sold, removed by natural disaster, or removed from the inventory for whatever reason, it must be taken off of the HMIS Owned Housing inventory.

Perform the following steps to remove an owned housing unit:

5.13.1 Search for the vacant housing unit.

5.13.2 Click on the link to the house you want to remove.

5.13.3 Enter the date of the effective removal in the **Stop Date** field.

5.13.4 Click **Save**.

> *The housing unit will no longer appear on any reports and will be removed from viewing.*

5.14 Deleting a Housing Unit

Three rules apply when deleting a housing unit:

- Only an AHO can delete an approved housing unit.
- Any user can delete an unapproved housing unit.
- Only a vacant housing unit can be deleted.

Perform the following steps to delete a housing unit:

5.14.1 Search for the vacant housing unit.

5.14.2 Click on the link to the house you wish to delete.

5.14.3 Click **Delete**.

The following message appears: **`Are you Sure Your Want to Delete?`**

5.14.4 Click **Yes** to delete the housing unit, or click **No** to cancel deletion.

6. CLAIMS AND APPEALS

Damage claim information is stored in HMIS for owned, leased, and ISSA housing. Although it is entered, the information is not considered valid unless it is approved. This limitation is provided to ensure that claims are not counted on any reports unless they are real claims.

Leased housing and ISSA claims are entered and approved by AHO staffs. Owned housing claims may be entered either and approved by either AHO or LHO staff.

In addition to claim information, there are also provisions to enter the recoupment information, tenant liability information, and lessor appeals and tenant appeals.

This section provides instructions for entering claims, recoupment, tenant, and lessor appeals.

NOTE: *All field definitions pertaining to claims are contained in* Appendix D, Claim Fields.

6.1 Claim Information Screen

The Claim and Recoupment screens are provided to allow you to enter damage claim and recoupment information for owned, leased, and ISSA housing. The screen is divided into two tabs: **Claim Information** and **Recoupment Information** (see Figure 6-1).

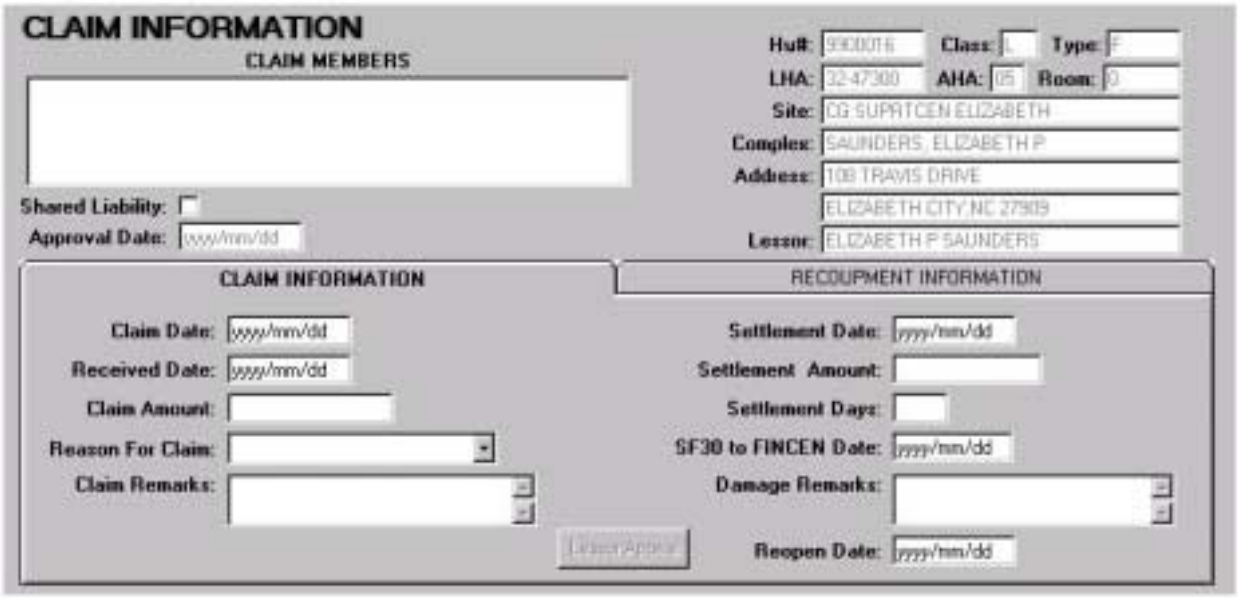


Figure 6-1 Claim Information Screen

6.2 Adding a Damage Claim

Damage claim information is entered for owned, leased, and ISSA housing. Although it is entered, the information is not considered valid unless it is approved. Claims that are not approved will not appear on reports.

For leased housing and ISSA housing, the AHO staff performs data entry. For owned housing, data entry is performed by the LHO staff or AHO staff.

Perform the following steps to add a damage claim:

6.2.1 Search for the housing unit.

6.2.2 Click on the link to the appropriate housing unit.

6.2.3 Click **Options**.

6.2.4 Click **Claims**.

You are prompted as illustrated in Figure 6-2.

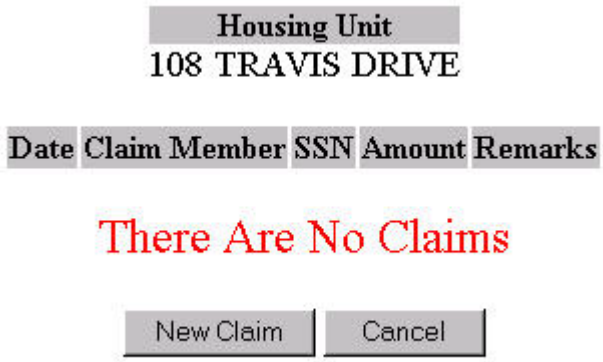


Figure 6-2 Damage Claim Prompt

6.2.5 Click **New Claim**.

6.2.6 Enter the information regarding the claim. Refer to *Appendix D, Claim Fields*, for field definitions.

6.2.7 Click **Save**.

6.3 Adding a Claim Member

Once a claim has been entered, and the claim can be attributed to a current or previous occupant, you must add a claim member to link the occupant with the claim.

Perform the following steps to add a claim member and link the member to a damage claim:

6.3.1 Search for the housing unit.

6.3.2 Click on the link to the appropriate housing unit.

6.3.3 Click **Options**.

6.3.4 Click **Claims**.

6.3.5 Click on the link to the appropriate damage claim.

6.3.6 Click **Members**.

The following message appears: **`There are no members associated with the claim.`**

6.3.7 Click **New Member**.

A claim member search screen appears.

6.3.8 In the **Last Name** field, enter the last name of the person responsible for this claim.

6.3.9 In the **Search By** field, select **Housing History** if the person is in HMIS History, or select **Search by All Housing** if the person is not in HMIS History.

6.3.10 Click **Search**.

The Claim Member screen appears as shown in Figure 6-3.

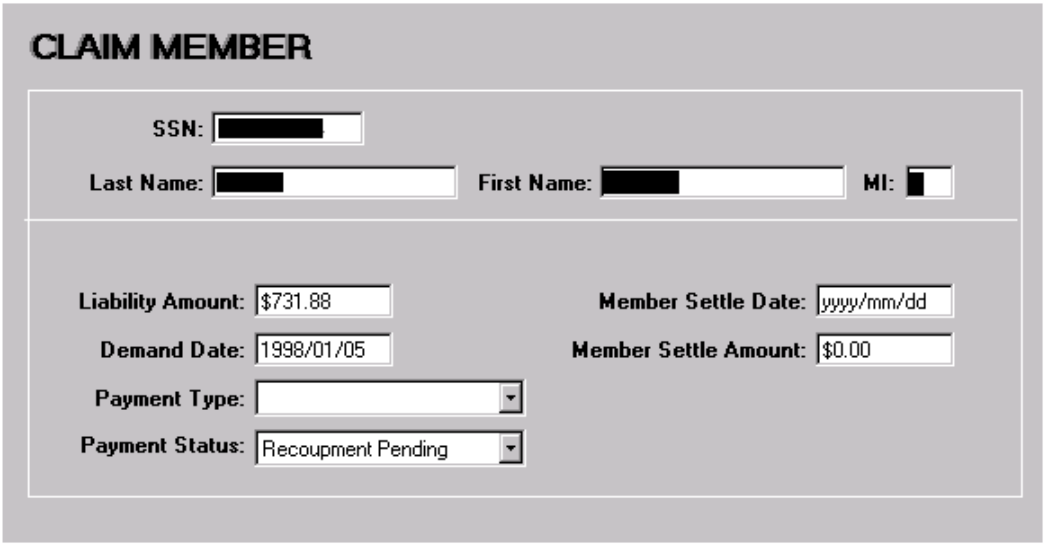


Figure 6-3 Claim Member Screen

6.3.11 Enter the following information:

- *Liability Amount*
- *Demand Date*
- *Payment Type*
- *Payment Status*
- *Member Settlement Date*
- *Member Settle Amount.*

6.3.12 Click **Save** to save the record.

6.4 Adding Damage Claim Recoupment

Recoupment information should be entered for all claims. The system will automatically calculate processing days for claims after the closed date is entered and will also calculate the percent recouped from the member. There is a provision for allowing shared liability for the claim.

Perform the following steps to add recoupment information for a damage claim:

6.4.1 Search for the housing unit.

6.4.2 Click on the link to the appropriate housing unit.

6.4.3 Click **Options**.

6.4.4 Click **Claims**.

6.4.5 Click on the appropriate claim.

6.4.6 Click the **Recoupment Information** tab.

6.4.7 Enter the following information:

- Recoupment amount
- Date the claim is considered closed (the claim is closed when PAA is sent to HRSIC)
- Any recoupment remarks.

6.4.8 Click **Save**.

6.5 Adding a Tenant Appeal

If a member appeals the damages assigned to him/her, enter the appeal information into HMIS.

Perform the following steps to add a tenant appeal:

6.5.1 Search for the housing unit.

6.5.2 Click on the link to the appropriate housing unit.

6.5.3 Click **Options**.

6.5.4 Select **Claims**.

6.5.5 Click on the link to the appropriate damage claim.

6.5.6 Click the **Recoupment Information** tab.

The Tenant Appeal Information screen appears as shown in Figure 6-4.

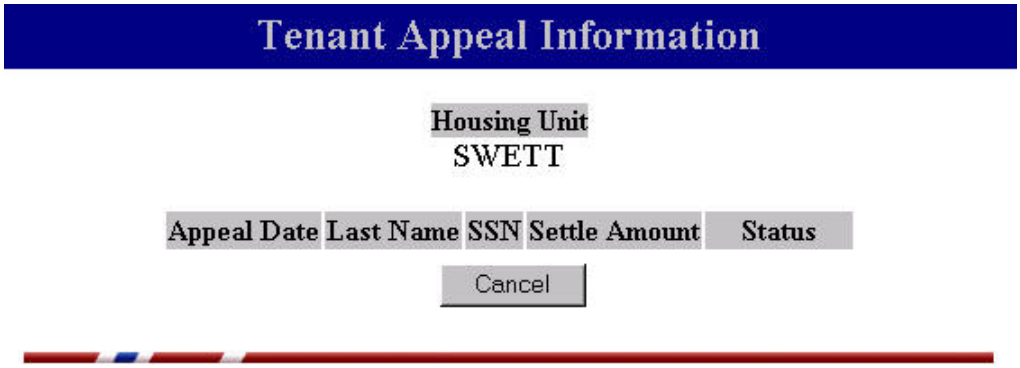


Figure 6-4 Tenant Appeal Information Screen

6.5.7 Click **New Appeal**.

The Appeal Information screen appears.

6.5.8 Perform the following steps:

- In the **Appeal Date** field, enter the date of the member's appeal.
- In the **Claim Member** field, select the member from the drop down box.
- In the **Appeal Settle Amount** field, enter the amount that is finally settled for the member to pay.

6.5.9 Click **Save**.

6.6 Adding a Lessor Appeal

If a lessor appeals the contracting officer's final decision for payment of damages, enter the appeal information into HMIS.

Perform the following steps to add a lessor appeal:

6.6.1 Search for the housing unit.

6.6.2 Click on the link to the appropriate housing unit.

6.6.3 Click **Options**.

6.6.4 Click **Claims**.

6.6.5 Click on the link to the appropriate damage claim.

6.6.6 Click **Lessor Appeal**.

The Lessor Appeal Information screen appears as shown in Figure 6-5.

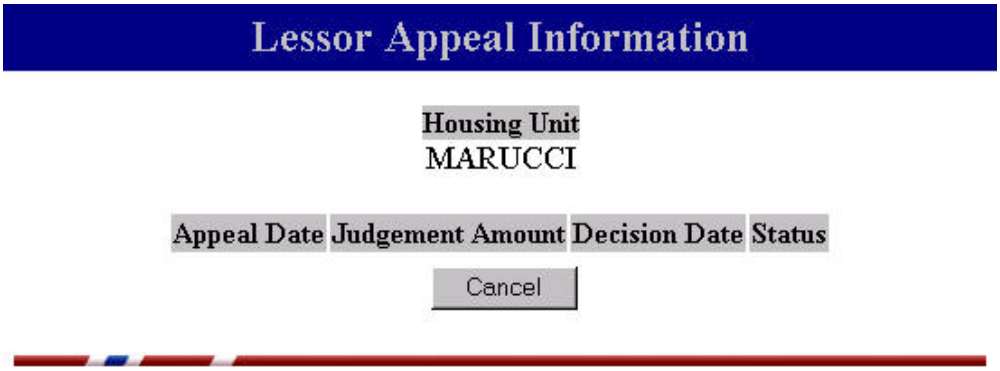


Figure 6-5 Lessor Appeal Information Screen

6.6.7 Click **New Appeal**.

6.6.8 Select **New Appeal**.

6.6.9 Enter the following information:

- *Appeal Date* (date the lessor appeals the contracting officer's final decision)
- *Judgment Amount* (new amount of the claim)
- *Decision Date* (date decision is made by the courts of a new claim amount).

6.6.10 Click **Save**.

7. LEASE AND LEASE MODIFICATIONS

This section provides information and instructions on lease contracts, printing leases, and creating, viewing, and updating lease modifications.

7.1 Printing a Lease

A Lease contract may be printed either from the **Housing Unit** tab or from the selection on the Main Menu.

7.1.1 Viewing a Lease from the Housing Unit Tab

Perform the following steps to view a lease from the **Housing Unit** tab:

7.1.1.1 Search for the housing unit.

7.1.1.2 Click the link to the appropriate housing unit.

7.1.1.3 Click **Print Lease** from the choices provided at the bottom of the page (see Figure 7-1).

Figure 7-1 Housing Tab Options

The Lease Report appears.

7.1.2 Viewing a Lease from the Main Menu

Perform the following steps to view a lease from the Main Menu:

7.1.2.1 From the HMIS Main Menu, click **Housing Unit Management**.

7.1.2.2 Click **Print Lease or Modification**.

7.1.2.3 Click **Print Lease**.

7.1.2.4 Enter the *Lease Number*.

7.1.2.5 Click **Print**.

The Lease Report appears.

7.2 Printing a Lease

7.2.1 From the Lease Report, click the **Printer** icon to send the report to your default printer.

A printer dialog box is appears.

7.2.2 Choose the print range and number of copies.

7.2.3 Click **OK** to print the Lease Report.

NOTE: *For more information on viewing, printing, and exporting reports, see* Section 9, Viewing, Printing, and Saving Reports.

7.3 Lease Contract

The *USCG Residential Lease, CG 5571*, is a legal document that binds the USCG and the Lessor. The data that is entered in HMIS will automatically print out and format the standard lease.

Incomplete or inaccurate data entry will determine whether or not the lease is properly prepared. The field list, portion of lease affected, and the locations of the database fields are provided in Table 7-1.

Table 7-1 Lease Field Effects

Location of Database Field	Field	Portion of Lease Affected
Site Page	Program Element	Lease Number
	Contracting Site	
	Contracting Officer	Lease Signature Block
Housing Unit Tab	Start Date	Lease Date Clause 3-The Term
	Bedrooms	Clause 2.a-Descriptions
	Square Feet	
	Cong District Co	
	Style	
	Baths	
	County	
	Total Rooms	
	Address	
	FY Option Year	Clause 4 & Clause 2
	Rent & Utilities	Clause 5.a

Location of Database Field	Field	Portion of Lease Affected
Lessor Tab	Lessor's Name	Clause 1-The Lessor
	SSN or Tax Code	Tax Code/SSN
	POC Telephone #	Telephone Number
	Correspondence Address	Correspondence Address
	Lessor's Interest in Property	Clause 1.e
Amenity Tab	Pest Control	Clause 2
	Smoke Detectors	
	Fire Sprinklers	
	Grounds Care	
	Pets	
	Child Care	

The following figures provide an example USCG Residential Lease:

Start Date
Program Element Code on Site Page
Lease Number

Lessor Name
Tax Code
Telephone

Correspondence and Check Mailing Addresses

Lessor's interest in property
Lessor is/is not a federal property

Bedrooms
Baths
Rooms
Square Feet
County
Congressional Dist
Code
Style
Address

UNITED STATES COAST GUARD RESIDENTIAL LEASE

October 4, 1989 (Lease Date) — 4090-29-91-L-P58-122-U (Lease Number)

THIS LEASE, made and entered into this date by and between the LESSOR named below, hereafter called the LESSOR and the UNITED STATES COAST GUARD, hereafter called the COAST GUARD.

1. THE LESSOR:

1.a. NAME/s: TANGLEWOOD APARTMENTS

1.b. Tax Code/Social Security #: [redacted]

1.c. Correspondence Address: 1000 HIBISCUS, LAGUNA VISTA, TX 78578

1.d. Check Mailing Address: LESSOR

1.e. Lessor's interest in the property herein described is that of agent for owner:

1.f. Lessor and/or owner is not a Federal Employee.

1.g. Lessor Successors: Should ownership of the premises pass to another individual or company, this lease is binding on the new owner.

WITNESSETH: The parties hereto for the considerations hereinafter mentioned covenant and agree as follows:

2. THE LEASE:

2.a. The Lessor hereby leases to the Coast Guard the following described premises:

Total Bdrms: 1 Total Baths: 2 Total Rooms: 4
Square Feet: 0 County:
Congressional Dist:
Construction Style: Apartment

Address: 1000 HIBISCUS, APT C-206
LAGUNA VISTA, TX 78578

2.b. The Lessor shall furnish a refrigerator and stove. The Government does not accept liability for furnishing, draperies and curtains left in the unit nor are these items made part of this contract. All other Lessor furnished items shall be included and noted in the Inspection Report as explained in the General Provisions.

2.c. The premises are used to house members of the Coast Guard and their dependents, if any, regardless of race, color, religion, sex or national origin.

1 Coast Guard _____ Lessor _____

DEPT. OF TRANSP., USCG, CG 5571 (9/94)

Figure 7-2 United States Coast Guard Residential Lease – Page 1

Start Date
Program Element
Code on Site Page
Lease Number
Pest Control

Smoke Detectors

Fire Sprinklers

Grounds Care

Pets and Pet Restrictions

Child Care

Start Date
FY Option Year

UNITED STATES COAST GUARD RESIDENTIAL LEASE

October 4, 1989 (Lease Date) | 4090-29-91-L-P58-122-U (Lease Number)

2. THE LEASE: (cont'd)

2.d. The Lessor shall keep the premises free from pests in conformance with local and state health regulations.

2.e. Smoke detectors are installed in accordance with federal, state and local regulations. Hardwired: [ ] Yes, [X] No.

2.f. Automatic (Fire) Sprinkler Systems are installed in accordance with federal, state and local regulations: [ ] Yes, [X] No, [X] N/A.

2.g. Grounds care is performed by Lessor.

2.h. Pets are not allowed.

2.i. Lessor does not permit child care.

2.i.(1) If permitted, no increase in rent or utilities will be paid to the Lessor.

2.i.(2) Child care is defined to be in-home care of more than one but no more than six children other than occupant dependents at a minimum of 10 hours per week per child for compensation.

2.j. The Lessor agrees to comply with all federal, state, and local laws which apply to the ownership and operation of the premises, and will obtain at Lessor expense all necessary permits and related approvals, including but not limited to those for lead, radon, asbestos, and other environmental and safety measures.

3. THE TERM:

TO HAVE AND TO HOLD the said premises with their appurtenances for the term beginning on October 4, 1989 through September 30, 1994 subject to termination and renewal rights as may be herein set forth. No lease shall exceed a period of five years.

4. THE RENEWAL:

Annually, effective 1 October, this lease will be automatically renewed at the option of the Coast Guard for the term stated in Clause 3, at the rate stated in Clause 5.a. After a period of twelve months, the annual rate may be subject to renegotiation. Evidence supporting rental rate adjustment, such as changes in property taxes, insurance premiums and/or inflationary indices, must be provided by the Lessor to the Coast Guard Local Housing Authority prior to the first of July. Lessor failure to notify the Coast Guard of requested rate adjustment will result in this lease being automatically renewed at the same rate. Requests for adjustment to utility costs are addressed in Clauses 5.f and 5.g of this lease.

No renewal shall extend beyond September 30, 1994.

2 Coast Guard _____ Lessor _____

DEPT. OF TRANSP., USCG, CG 5571 (9/94)

Figure 7-3 United States Coast Guard Residential Lease – Page 2

UNITED STATES COAST GUARD RESIDENTIAL LEASE

FY Option Year

October 4, 1989 (Lease Date) | 4090-29-91-L-P58-122-U (Lease Number)

5. PAYMENT TO LESSOR:

Rent Utilities

5.a. The Coast Guard shall pay the Lessor an annual amount of $ 6,120.00 at the rate of $ 510.00 per month in arrears. The monthly payment is comprised of:

for rent: $ 400.00
for utilities: $ 110.00

5.b. Payments to the Lessor will be due on the 5th workday of the month for the preceding month's rent. The date of the check issued in payment shall be considered to be the date payment is made.

5.c. The Prompt Payment Act, Public Law 97-177 (96 Stat.85, 31 USC 1801) is applicable to payment under this contract and requires the payment to the Lessor of interest on overdue payment and improperly taken discounts. Determination of interest due will be made in accordance with the Prompt Payment Act and Office of Management and Budget Circular A-125.

5.d. Payments include all utility charges for heat, water, sewage, gas, electricity, and trash removal except in geographic locations where state and local regulations do not allow inclusion. Telephone and cable television are the responsibility of the occupant.

5.e. Rent for a lesser period shall be prorated as 1/30th of the per month rate.

5.f. The utility rate is based on an average monthly cost calculated over a twelve month period. Twelve (12) months after initial or subsequent occupancy, this lease may be adjusted upward or downward to compensate for incorrect estimates for utility amounts. It is the Lessor's responsibility to monitor utility consumption and to provide the Coast Guard with verifiable utility consumption documentation for a twelve (12) month period. Failure to provide required documentation will not justify utility payment adjustments.

5.g. It is the Lessor's responsibility to maintain all utility machinery in efficient operation. The Lessor is responsible to notify the Coast Guard immediately of any excessive utility costs. A one time utility payment may be authorized by the Coast Guard to compensate for verifiable utility abuse by the occupant. Documentation supporting utility abuse must be provided by the Lessor prior to reimbursement.

6. TERMINATION:

The Coast Guard may terminate this lease at any time by giving at least a 30 day notice in writing to the Lessor. Said notice shall be computed commencing with the day after the date of mailing. No rental payment shall accrue after the effective date of termination.

3 Coast Guard _____ Lessor _____

DEPT. OF TRANSP., USCG, CG 5571 (9/94)

Figure 7-4 United States Coast Guard Residential Lease – Page 3

7. AVAILABILITY OF FUNDS:

Unless otherwise notified, funds will become available on the effective date of this lease and any subsequent renewals. The Coast Guard's obligation hereunder is contingent upon the availability of appropriated funds from which payment for this contract can be made. No legal liability on the part of the Coast Guard for payment of any money shall arise unless and until funds are made available to the Contracting Officer for this procurement. You will be notified immediately if funds do not become available for this procurement.

8. MODIFICATION TO CONTRACT:

The following Clauses within this lease may be modified using Form 5571B, Modification to Contract, as consented to by the Lessor and the Leased Housing Contracting Officer.: Clauses 1.a-f, 2.a-b, 2.g-i, 3 and 5.a. The attached General Provisions may not be modified.

9. ATTACHMENTS:

Coast Guard Form 5571A, United States Coast Guard Residential Lease General Provisions and the Condition Inspection Report are attached and made a part hereof.

10. CONTRACTING OFFICER:

Contracting Officer
Contracting Officer's Address

The Coast Guard Leased Housing Contracting Officer may be contacted at the following address and telephone number:

Phone:

LESSOR

BY _____ _____
Lessor Signature Lessor Signature

UNITED STATES COAST GUARD

BY

_____ _____
Leased Housing Contracting Officer
Authority: 14 U.S.C. 475(a)

4 Coast Guard _____ Lessor _____

DEPT. OF TRANSP., USCG, CG 5571 (9/94)

Figure 7-5 United States Coast Guard Residential Lease – Page 4

7.4 Lease Modification

The *USCG Residential Lease, CG 5571*, is a legal document that binds the USCG and the Lessor. Any changes that are made on the contract must be made on Form 5571B, Modification to Contract. Lease modifications are created and stored in HMIS. Modification numbers are automatically generated based on (1) the Fiscal Year and (2) previous modifications created in a fiscal year. Samples of all modifications are provided in *Section 7.6, Modification Examples*.

Perform the following the steps to create all lease modifications:

7.4.1 Select **Housing/Lease Information**.

7.4.2 Click **Lease Modification**.

7.4.3 Click **New Modification**.

7.4.4 Select the type of modification, and enter the appropriate data according to Table 7-2.

Table 7-2 Modifications and Data Entry

Type of Modification	Enter the following…
Rent Change	Effective date of the rent change
	New rent amount
Utility Change	Effective date of the utility change
	New utility amount
Termination	Effective date of the termination
	Check if the lessor agrees to waive the 30 days notice.
Miscellaneous	Effective date of the modification
	Click on the modification description and enter the authority to perform the modification.
	Click on the second description down arrow and enter a complete description of the change.
One-Time Utility Payment	Effective date of the one-time payment
	Enter the period covered by the one-time payment.
	Enter the amount of the one-time payment.
Rent and Utility Change	Effective date of rent and Utility Change
	Enter the new rent amount
	Enter the new utility amount

7.4.5 Click **Save**.

*After saving, a **Print & Delete** button will appear at the bottom of the screen.*

NOTE: *The system automatically updates HMIS for rent, rent and utility, and lessor address change modifications.*

*The system does not automatically update HMIS with a termination or miscellaneous modification. Miscellaneous modifications must be entered into HMIS, if applicable. Using the **Cancel Lease** function will effect termination modifications.*

7.5 View Previous Lease Modifications

Lease Modifications are created and stored in HMIS. As long as the effective date has not been reached, they may be retrieved, updated, and reprinted to make corrections. If the effective date has taken place, the modification may not be updated.

Perform the following steps to view lease modifications:

7.5.1 From the Main Menu, select **Housing Unit Management**.

7.5.2 Select **Active House / Lease Information**.

7.5.3 Select **Search / Modify Existing Housing Unit**.

7.5.4 Select the appropriate criteria to search for the housing unit.

7.5.5 Click the **Search** button.

7.5.6 Select the housing unit you wish to modify.

7.5.7 Click the **Options** button.

7.5.8 Click **Modification History**.

A listing is displayed containing lease number, modification number, effective date type of modification, and rent utilities.

7.6 Update Lease Modifications

Lease modifications are created and stored in HMIS. As long as the effective date has not been reached, they may be retrieved, updated, and reprinted to make corrections. If the effective date has taken place, the modification may not be updated.

Perform the following steps to update lease modifications:

7.6.1 Select **Housing/Lease Information**.

7.6.2 Click **Lease Modification**.

7.6.3 Enter the *Lease Number*.

7.6.4 Click **Search**.

7.6.5 Make any necessary changes.

7.6.6 Click **Save**.

7.7 Modification Examples

This section contains example forms for various modifications.

MODIFICATION OF CONTRACT

1. MODIFICATION NO. 003
2. EFFECTIVE DATE December 1, 1995
3. DATE PREPARED November 9, 1995

4. ISSUED BY: Commander(ah)
Seventh Coast Guard District
909 S.E. 1st Avenue
Miami, FL 33131-3050
Phone: (305) 536-5687

5. NAME AND ADDRESS OF CONTRACTOR

TRIANGLE DEVELOPERS
D/B/A WINDMILL LAKES APARTMENT
450 SW 88TH TERRACE

6A MODIFICATION OF CONTRACT/ORDER NO.
4096-28-95-L-P57-B72-F

6B DATED
September 11, 1995

7. THIS ITEM APPLIES ONLY TO MODIFICATION OF CONTRACTS, IT MODIFIES THE CONTRACT NO. AS DESCRIBED IN ITEMS 6A AND 8.

A. TYPE OF MODIFICATION AND AUTHORITY:

Clause 5.f, U.S. Coast Guard Residential Lease, CG5571, PAYMENT TO LESSOR, renegotiation of utility amount.

8. DESCRIPTION OF MODIFICATION

PREMISES: 8664 SW 3RD STREET #206
PEMBROKE PINES, FL 33025

DESCRIPTION: Pursuant to Clause 5.f of the Lease, the Government does hereby modify the payment for UTILITIES. Effective December 1, 1995 the new monthly payment for these premises is amended as follows:

FROM		TO	
$640.00	for rent	$640.00	for rent
$100.00	for utilities	$150.00	for utilities
$100.00	for utilities	$150.00	for utilities
$740.00	Total Per month	$790.00	Total Per month

All other conditions and terms remain in full force and effect throughout the Term of this lease.

9A. LESSOR

_____
(Typed name of Lessor)

BY _____
(Signature)

DATE SIGNED: _____

10A. LEASED HOUSING CONTRACTING OFFICER

_____
(Typed name of Contracting Officer)

10B. UNITED STATES OF AMERICA

_____
(Signature)

DATE SIGNED: _____

DEPT. OF TRANSP., USCG, CG 5571B (7/95)

Figure 7-6 Utility Change Example

MODIFICATION OF CONTRACT

1. MODIFICATION NO.	2. EFFECTIVE DATE	3. DATE PREPARED
005	December 15, 1995	November 9, 1995

4. ISSUED BY: Commander(ah)
Seventh Coast Guard District
909 S.E. 1st Avenue
Miami, FL 33131-3050
Phone: (305) 536-5687

5. NAME AND ADDRESS OF CONTRACTOR

TRIANGLE DEVELOPERS
D/B/A WINDMILL LAKES APARTMENT
450 SW 88TH TERRACE

6A MODIFICATION OF CONTRACT/ORDER NO.
4096-28-95-L-P57-B72-F

6B DATED
September 11, 1995

7. THIS ITEM APPLIES ONLY TO MODIFICATION OF CONTRACTS, IT MODIFIES THE CONTRACT NO. AS DESCRIBED IN ITEMS 6A AND 8.

A. TYPE OF MODIFICATION AND AUTHORITY:

Clause 6, U.S. Coast Guard Residential Lease, CG5571, TERMINATION

8. DESCRIPTION OF MODIFICATION

PREMISES: 8664 SW 3RD STREET #206
PEMBROKE PINES, FL 33025

DESCRIPTION:

Pursuant to the termination clause of the Lease, the Government does hereby terminate this lease in whole. Effective, December 15, 1995 no rental shall accrue. The Government will pay you rent prorated through December 14, 1995.

All other conditions and terms remain in full force and effect through December 14, 1995.

9A. LESSOR

_____
(Typed name of Lessor)

BY _____
(Signature)

DATE SIGNED: _____

10A. LEASED HOUSING CONTRACTING OFFICER

_____
(Typed name of Contracting Officer)

10B. UNITED STATES OF AMERICA

_____
(Signature)

DATE SIGNED: _____

DEPT. OF TRANSP., USCG, CG 5571B (7/95)

Figure 7-7 Termination Modification Example

MODIFICATION OF CONTRACT

1. MODIFICATION NO.	2. EFFECTIVE DATE	3. DATE PREPARED
006	November 1, 1995	November 9, 1995

4. ISSUED BY: Commander(ah)
Seventh Coast Guard District
909 S.E. 1st Avenue
Miami, FL 33131-3050
Phone: (305) 536-5687

5. NAME AND ADDRESS OF CONTRACTOR

TRIANGLE DEVELOPERS
D/B/A WINDMILL LAKES APARTMENT
450 SW 88TH TERRACE

6A MODIFICATION OF CONTRACT/ORDER NO.
4096-28-95-L-P57-B72-F

6B DATED
September 11, 1995

7. THIS ITEM APPLIES ONLY TO MODIFICATION OF CONTRACTS, IT MODIFIES THE CONTRACT NO. AS DESCRIBED IN ITEMS 6A AND 8.

A. TYPE OF MODIFICATION AND AUTHORITY:

8. DESCRIPTION OF MODIFICATION

PREMISES: 8664 SW 3RD STREET #206
PEMBROKE PINES, FL 33025

DESCRIPTION:

All other conditions and terms remain in full force and effect throughout the Term of this lease.

9A. LESSOR

_____
(Typed name of Lessor)

BY _____
(Signature)

DATE SIGNED: _____

10A. LEASED HOUSING CONTRACTING OFFICER

_____
(Typed name of Contracting Officer)

10B. UNITED STATES OF AMERICA

_____
(Signature)

DATE SIGNED: _____

DEPT. OF TRANSP., USCG, CG 5571B (7/95)

Figure 7-8 Other Modifications Example

MODIFICATION OF CONTRACT

1. MODIFICATION NO. 001
2. EFFECTIVE DATE November 1, 1995
3. DATE PREPARED November 9, 1995

4. ISSUED BY: Commander(ah)
Seventh Coast Guard District
909 S.E. 1st Avenue
Miami, FL 33131-3050
Phone: (305) 536-5687

5. NAME AND ADDRESS OF CONTRACTOR

TRIANGLE DEVELOPERS
D/B/A WINDMILL LAKES APARTMENT
450 SW 88TH TERRACE

6A MODIFICATION OF CONTRACT/ORDER NO.
4096-28-95-L-P57-B72-F

6B DATED
September 11, 1995

7. THIS ITEM APPLIES ONLY TO MODIFICATION OF CONTRACTS, IT MODIFIES THE CONTRACT NO. AS DESCRIBED IN ITEMS 6A AND 8.

A. TYPE OF MODIFICATION AND AUTHORITY:

Clause 4, U.S. Coast Guard Residential Lease, CG5571, THE RENEWAL, renegotiation of rent amount.

8. DESCRIPTION OF MODIFICATION

PREMISES: 8664 SW 3RD STREET #206
PEMBROKE PINES, FL 33025

DESCRIPTION: Pursuant to Clause 4 of the Lease, the Government does hereby modify the monthly payment for RENT. Effective November 1, 1995 the new monthly payment for these premises is amended as follows:

FROM		TO	
$640.00	for rent	$700.00	for rent
$100.00	for utilities	$100.00	for utilities
$740.00	Total Per month	$800.00	Total Per month

All other conditions and terms remain in full force and effect throughout the Term of this lease

9A. LESSOR

_____
(Typed name of Lessor)

BY _____
(Signature)

DATE SIGNED: _____

10A. LEASED HOUSING CONTRACTING OFFICER

_____
(Typed name of Contracting Officer)

10B. UNITED STATES OF AMERICA

_____
(Signature)

DATE SIGNED: _____

DEPT. OF TRANSP., USCG, CG 5571B (7/95)

Figure 7-9 Rent Change Example

MODIFICATION OF CONTRACT

1. MODIFICATION NO.	2. EFFECTIVE DATE	3. DATE PREPARED
003	December 1, 1995	November 9, 1995

4. ISSUED BY: Commander(ah)
Seventh Coast Guard District
909 S.E. 1st Avenue
Miami, FL 33131-3050
Phone: (305) 536-5687

5. NAME AND ADDRESS OF CONTRACTOR

TRIANGLE DEVELOPERS
D/B/A WINDMILL LAKES APARTMENT
450 SW 88TH TERRACE

6A MODIFICATION OF CONTRACT/ORDER NO.
4096-28-95-L-P57-B72-F

6B DATED
September 11, 1995

7. THIS ITEM APPLIES ONLY TO MODIFICATION OF CONTRACTS, IT MODIFIES THE CONTRACT NO. AS DESCRIBED IN ITEMS 6A AND 8.

A. TYPE OF MODIFICATION AND AUTHORITY:

Clause 5.f, U.S. Coast Guard Residential Lease, CG5571, PAYMENT TO LESSOR, renegotiation of utility amount.

8. DESCRIPTION OF MODIFICATION

PREMISES: 8664 SW 3RD STREET #206
PEMBROKE PINES, FL 33025

DESCRIPTION: Pursuant to Clause 5.f of the Lease, the Government does hereby modify the payment for UTILITIES. Effective December 1, 1995 the new monthly payment for these premises is amended as follows:

FROM		TO	
$640.00	for rent	$640.00	for rent
$100.00	for utilities	$150.00	for utilities
$740.00	Total Per month	$790.00	Total Per month

All other conditions and terms remain in full force and effect throughout the Term of this lease.

9A. LESSOR

_____
(Typed name of Lessor)

BY _____
(Signature)

DATE SIGNED: _____

10A. LEASED HOUSING CONTRACTING OFFICER

_____
(Typed name of Contracting Officer)

10B. UNITED STATES OF AMERICA

_____
(Signature)

DATE SIGNED: _____

DEPT. OF TRANSP., USCG, CG 5571B (7/95)

Figure 7-10 Utility Change Example

MODIFICATION OF CONTRACT

1. MODIFICATION NO.	2. EFFECTIVE DATE	3. DATE PREPARED
001	November 1, 1995	November 9, 1995

4. ISSUED BY: Commander(ah)
Seventh Coast Guard District
909 S.E. 1st Avenue
Miami, FL 33131-3050
Phone: (305) 536-5687

5. NAME AND ADDRESS OF CONTRACTOR

TRIANGLE DEVELOPERS
D/B/A WINDMILL LAKES APARTMENT
450 SW 88TH TERRACE

6A MODIFICATION OF CONTRACT/ORDER NO.
4096-28-95-L-P57-B72-F

6B DATED
September 11, 1995

7. THIS ITEM APPLIES ONLY TO MODIFICATION OF CONTRACTS, IT MODIFIES THE CONTRACT NO. AS DESCRIBED IN ITEMS 6A AND 8.

A. TYPE OF MODIFICATION AND AUTHORITY:

Clause 5.g, U.S. Coast Guard Residential Lease, CG5571, PAYMENT TO LESSOR, one time utility payment.

8. DESCRIPTION OF MODIFICATION

PREMISES: 8664 SW 3RD STREET #206
PEMBROKE PINES, FL 33025

DESCRIPTION: Pursuant to Clause 5.g of the Lease, the Government does hereby provide a one time payment for excessive utility costs incurred during the period:

from: January 1, 1994
to: January 1, 1995

The one time payment is: $1,500.00

All other conditions and terms remain in full force and effect throughout the Term of this lease.

9A. LESSOR

_____
(Typed name of Lessor)

BY _____
(Signature)

DATE SIGNED: _____

10A. LEASED HOUSING CONTRACTING OFFICER

_____
(Typed name of Contracting Officer)

10B. UNITED STATES OF AMERICA

_____
(Signature)

DATE SIGNED: _____

DEPT. OF TRANSP., USCG, CG 5571B (7/95)

Figure 7-11 One-Time Utility Payment Example

MODIFICATION OF CONTRACT

1. MODIFICATION NO.	2. EFFECTIVE DATE	3. DATE PREPARED
006	December 31, 1995	November 9, 1995

4. ISSUED BY: Commander(ah)
Seventh Coast Guard District
909 S.E. 1st Avenue
Miami, FL 33131-3050
Phone: (305) 536-5687

5. NAME AND ADDRESS OF CONTRACTOR

TRIANGLE DEVELOPERS
D/B/A WINDMILL LAKES APARTMENT
450 SW 88TH TERRACE

6A MODIFICATION OF CONTRACT/ORDER NO.
4096-28-95-L-P57-B72-F

6B DATED
September 11, 1995

7. THIS ITEM APPLIES ONLY TO MODIFICATION OF CONTRACTS, IT MODIFIES THE CONTRACT NO. AS DESCRIBED IN ITEMS 6A AND 8.

A. TYPE OF MODIFICATION AND AUTHORITY:

Clause 4, U.S. Coast Guard Residential Lease, CG5571, THE RENEWAL, renegotiation of annual rent amount.

8. DESCRIPTION OF MODIFICATION

PREMISES: 8664 SW 3RD STREET #206
PEMBROKE PINES, FL 33025

DESCRIPTION: Pursuant to Clause 4 of the Lease, the Government does hereby modify the monthly payment for rent. Effective December 31, 1995 the new monthly payment for these premises is amended as follows:

FROM		TO	
$640.00	for rent	$700.00	for rent
$100.00	for utilities	$165.00	for utilities
$740.00	Total Per month	$865.00	Total Per month

All other conditions and terms remain in full force and effect throughout the Term of this lease.

9A. LESSOR

(Typed name of Lessor)

BY (Signature)

DATE SIGNED:

10A. LEASED HOUSING CONTRACTING OFFICER

(Typed name of Contracting Officer)

10B. UNITED STATES OF AMERICA

(Signature)

DATE SIGNED:

DEPT. OF TRANSP., USCG, CG 5571B (7/95)

Figure 7-12 Rent and Utility Change Example

8. FISCAL YEAR RENEWAL

At the end of each fiscal year, leased housing contracts may need to be renewed or the rents and utilities may need to be modified. The HMIS Fiscal Year Renewal Process automates the steps necessary to:

- Prepare letters to lessors for those renewing leases
- Prepare lease modifications and new leases
- Cancel those leases not renewing (on September 30)
- Update the rent and utilities (effective October 1)
- Change the lease number of those leases renewing (effective October 1)
- Generate the Finance Center (FINCEN) required reports.

All steps of the Fiscal Year Renewal Process are available to the user at any time except the "Copy Fiscal Year" step, which is available only during October of any fiscal year. This step should be run by the AHO as close to October 1 as possible.

CAUTION: The HMIS Fiscal Year Renewal Process shall be used by all AHO sites to complete the fiscal year functions. Failure to use the process will result in detrimental effects to your data.

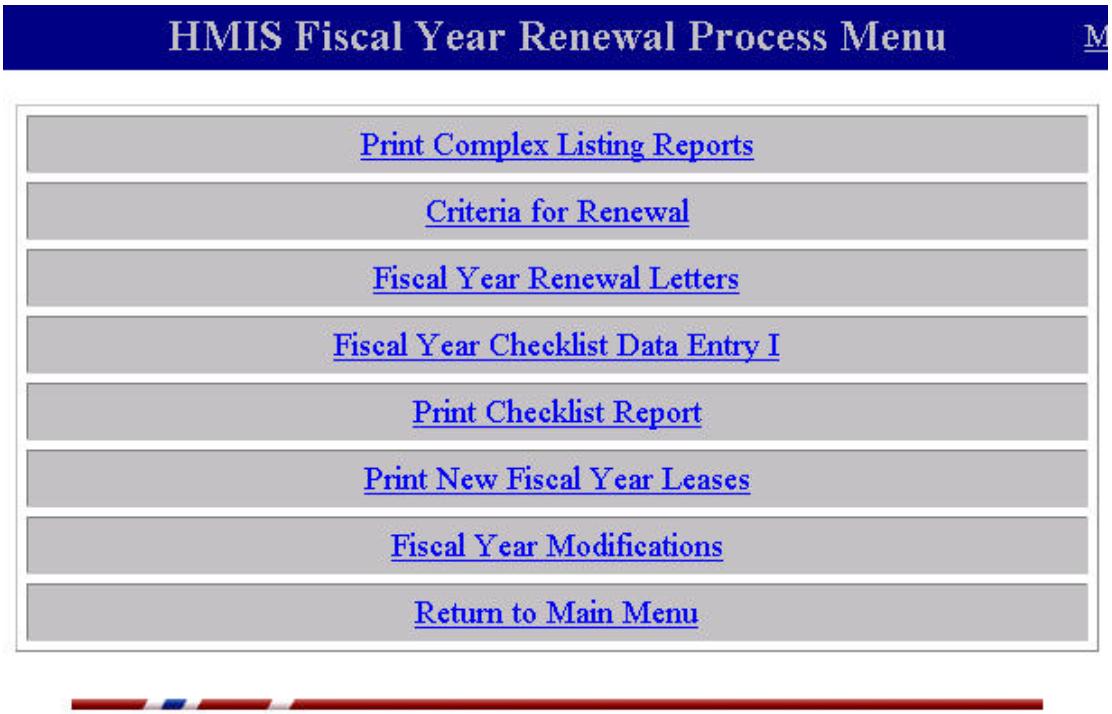


Figure 8-1 Fiscal Year Renewal Process Menu

The following list provides a summary of the steps involved in the Fiscal Year Renewal Process. It is intended to provide an understanding of the process and demonstrate the purpose for each step. Please refer to the detailed pages for precise actions associated with each step.

HMIS Fiscal Year Renewal Process

1. Print Complex Listing Report. The **COMPLEX** field is used by HMIS to group the printing of leases, modifications, and letters to the lessors. For this reason, it is crucial that the first step of the Fiscal Year Renewal Process is to have the AHO staff validate that all COMPLEXES are consistent. This step will provide a report of all leases sorted by COMPLEX. Discrepancies should be identified and corrected prior to beginning Step 2.
2. Criteria for Renewal. This step provides the user an on-screen drop down box to select the action required for each lease. The values contained in the list box are:
   - **R** to Renew
   - **M** to prepare MODS for cost changes
   - **C** to Cancel
   - **N** for Not Applicable.

   All leases are defaulted with an **N** at the beginning of the Fiscal Year Renewal Process.
3. Fiscal Year Renewal Letters. This step will automatically generate letters to the lessors for those leases that were marked with an **R** in the action box.
4. Fiscal Year Checklist Data Entry II. This step provides the user with an on-screen checklist to enter data that will be used to create the modifications and new leases as well as update HMIS at the beginning of the new fiscal year.
5. Print Checklists Report. A printed copy of the checklist is provided in step 4 to validate that all data has been entered into HMIS. The checklist may be printed any time after steps 1, 2, and 3 are complete.
6. Print New Fiscal Year Leases. Provides mass or single printing of those leases with an action of **R** and that have been assigned a new lease number.
7. Print Fiscal Year Modifications. Provides mass or single printing of those leases with an action of **M**. Rent and utility changes should have been entered in the checklist.
8. Copy New Lease Information. This step is performed only after steps 1-7 are complete and is available only to the user from October 1-October 31 of the new fiscal year. This step should be completed as close to October 1 as possible.

8.1 Step 1 – Print Complex Listing

Fiscal Year Renewal letters, lease modifications, and new leases are grouped and generated using the contents of the **COMPLEX** field. This field must contain consistent values for each apartment complex and owners. Otherwise, the renewal letters and leases will be incorrectly generated. This report is provided as the first step to assist in identifying incorrect **COMPLEX** fields. If discrepancies are found, corrections should be made and this step repeated until all corrections have been made.

Perform the following steps to validate the **COMPLEX** field:

8.1.1 Select **Print Complex Listing Report** from the Fiscal Year Renewal Process Menu.

8.1.2 Click the **Printer** icon to send the report to your default printer.

8.1.3 Review the report for inconsistent values in COMPLEX.

8.1.4 Make all necessary changes to HMIS.

8.1.5 If corrections are made, repeat Step 8.1.1 until you are sure the values are consistent.

The Complex Listing Report is sorted by COMPLEX. The sample provided in Figure 8-2 demonstrates both correct and incorrect values for COMPLEX.

ISC Anywhere
1999/04/27

COMPLEX LISTING REPORT
Sorted by Complex

KEY NUM	HU #	COMPLEX	ADDRESS
01-36111-2485	9900018	**(missing complex)**	46 DEAN ST.
01-36666-2480	9600177	ALLEN,S	93 LINTON STREET
01-36111-2468	9900001	ALLEY	7 DAVIS LANE
01-36111-2469	9900002	ANDERSON	102 MASONIC STREET
01-36666-2389	9500150	BALFOUR REAL ESTATE	12 WOODCREST ROAD
32-47777-677	9900014	BARLETTA	48 NEW WAY LANE
01-25555-2556	9800039	BAY VIEW ESTATES	100 ALMEIDA TERRACE
32-47777-2715	9800020	BAYSIDE COUNTRY CLUB	212 SANDY LANE
01-25555-2530	9700150	**BAYSIDE COUNTERY CLUB**	212 SANDY LANE APT. 6101
32-47777-1187	9800009	BORSKY	127 CAFALDO DRIVE
32-47777-2704	9700142	BORSKY	138 HILLTOP ROAD
01-36666-1282	9500027	CASTLE COURT	4980 NORTH MAIN STREET
01-36666-1289	9500028	**CASTLE CT.**	4980 NORTH MAIN STREET
01-36666-1299	9500029	CASTLE COURT	4980 NORTH MAIN STREET
01-36666-1310	9500030	CASTLE COURT	4980 NORTH MAIN STREET
01-36666-1320	9500031	CASTLE COURT	4980 NORTH MAIN STREET
01-36666-1330	9500032	**CASTLE CRT**	4980 NORTH MAIN STREET

Figure 8-2 Complex Listing Sample Report

In the example in Figure 8-2, the following discrepancies identified by bold text should be corrected in HMIS, identified by bold text.

- Lease number **9900018** is missing a value for **COMPLEX**.
- Lease number **9700150** "**Country**" is incorrectly spelled "**Countery**".
- Lease number **9500028** "**Court**" is incorrectly abbreviated "**CT**".
- Lease number **9700032** "**Court**" is incorrectly abbreviated "**CRT**".

The Complex is consistent for the following lease numbers:

- **9800009**
- **9700142**
- **9500029**
- **9500030**
- **9500031**.

There is insufficient information to determine whether the remaining COMPLEXES are correct. Careful validation and knowledge of the inventory will ensure consistent and appropriate values for the field.

8.2 Step 2 - Criteria for Renewal

For this step, the AHO user selects the appropriate (if any) action that is required for each lease.

The Fiscal Year Criteria screen lists all Leases in your inventory by Lease Number, an Action list-box, and the Option Year. The required action is selected by clicking on the drop down arrow and selecting either **R** (renew), **M** (modification), or **C** (cancel).

CAUTION: The *ACTION* selected in this step is used as the baseline for the entire Fiscal Year Process and determines whether to generate letters to the lessors or to print a new lease or modification. If this step is not completed, the Fiscal Year Process within HMIS will fail.

Perform the following steps to complete Criteria for Renewal:

8.2.1 Select **Fiscal Year Renewal Process** from the Main Menu.

8.2.2 Click **Criteria for Renewal**.

8.2.3 Use Table 8-1 to determine the required *ACTION*.

Table 8-1 Criteria for Renewal Decision Table

If Option Year is…	And…	Then…
Current Year	Lease is not needed	Select **C** (cancel)
	You wish to continue the lease	Select **R** (renew)
Beyond the Current Year	The lessor has asked for a rent and/or utility change, and the change is justified	Select **M** (modification)
	The Housing Office is changing the rent and/or utility (with lessor approval)	

NOTE: *Use of this matrix alone does not justify continued leasing activity. Review leased housing directives prior to renewing and/or increasing rent and/or utilities.*

8.2.4 To select the ACTION, click on the list-box as indicated below and select either **C**, **R**, or **M**.

8.2.5 Continue selecting the action required on each lease on the individual screens.

NOTE: *As you are selecting the action, you may view any of the leases by clicking on the lease number. After completing each screen, click **SAVE** before moving to the next screen. Move to the next screen by clicking >. See Figure 8-3.*

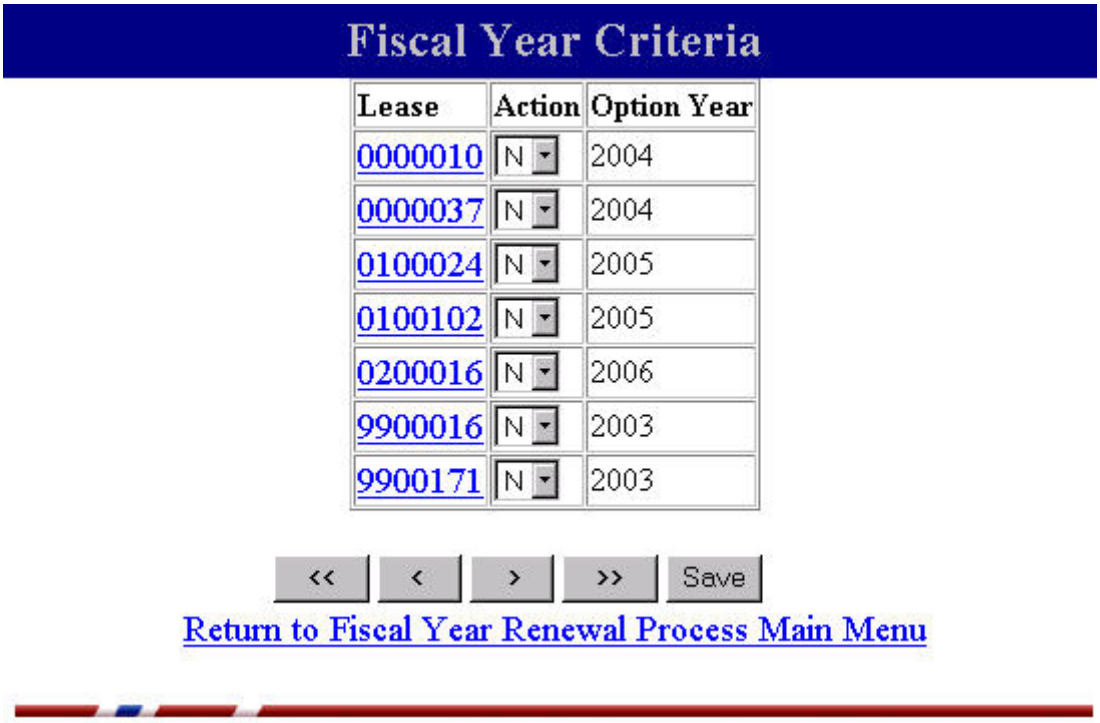


Figure 8-3 Fiscal Year Criteria Screen

8.2.7 Click **Return to Fiscal Year Renewal Process Main Menu** to exit the Fiscal Year Criteria screen.

CAUTION: You may exit this screen and come back later to resume entering the data; however, you may not complete any other steps until all leases that need to be renewed, cancelled, or modified are marked appropriately.

8.3 Step 3 - Fiscal Year Renewal Letters

This step generates letters to all of the lessors for those leases with an action of **R** (renew). The letter communicates your intent to renew the lease, unless the lessor responds negatively. The letter does not solicit rent and/or utility change requests; however, it does provide the lessor an opportunity to select the number of desired option years. Attached to the letter is an enclosure that lists the leases (that were marked with an **R**), the current rent amount, current utility amount, and the address.

Perform the following steps to print the Renewal Letters:

8.3.1 Select **Fiscal Year Renewal Letters** from the Fiscal Year Renewal Process Menu.

8.3.2 If you wish to print all letters at one time, click **Print All Renewal Letters**. If you wish to print only one complex, enter the complex name, and click **Search** (searching for Complexes provides a listing of all leases by the Complex name). You can either click on a Complex or press **ENTER** to search and enter the complex that you wish to print the letters for.

The following screen appears:

Figure 8-4 Print Fiscal Year Renewal Letters Screen

8.3.3 Enter the deadline date for the lessors to return the letters.

8.3.4 Enter your Fax Number.

8.3.5 Enter the name and title of the person signing the letters if not the Contracting Officer.

8.3.6 Click **Print Lease Renewal Letters**.

Figure 8-5 Sample Lease Renewal Letter

13 May 1999
11101

Lessor's name & address taken from HMIS

Mr. John Smith
2121 WEST MAIN ROAD
PORTSMOUTH, RI 02871

Dear Lessor:

Thank you for your participation in the Coast Guard Leased Housing Program.

The Coast Guard would like to renew those leases which expire on September 30th of this year. The attached list provides the address, lease number, and current rent and utility amounts for those leases affected.

Please review the attached list and verify the amounts. If they are incorrect, make the corrections on the lines provided. Any adjustments to the rental and/or utility amounts must be supported by verifiable documentation. The term of the lease will be five years unless you indicate otherwise. If you would like to renew for less t years, please circle the desired number of years.

Date entered in Step 5

Sign and date in the space provided on the last page of the attachment, apply the appropriate postage on the enclosed envelope and mail to this office. Your response should be returned not later than July 15, 1999.

Upon receipt of your signed letter, a new lease will be prepared and forwarded to you for signature. Your cooperation and continued support of the Coast Guard Leased Housing Program is greatly appreciated.

Sincerely,

[redacted]
Asst. Area Housing Officer
U.S Coast Guard
By Direction of the Commanding Officer

Name & Title of person entered in Step 7

Figure 8-6 displays a sample attachment to a Lease Renewal Letter. Only those leases that were marked with an **R** will be displayed in the attachment.

```
Complex:  CHESTNUT HILL          Current          Corrected    Current
Corrected
 Rent          Rent                 Util          Util           Years


100 ALMEIDA TER #210          $715.00       $_________          $0.00  $_________      2
3 4 5
PORTSMOUTH, RI 02871
        Lease Number:9500001

        - - - - - - -
        Total Leases:  1
        Total Monthly Rent:   $715.00
        Average Monthly Rent:        $715.00

        Signature:_____________________________  Date:___/___/______

          Title:                                  Daytime Phone:(      )      -
```

Figure 8-6 Sample Attachment to a Lease Renewal Letter

This attachment provides the lessor with an opportunity to verify the rent, utility, and address, as well as to select the years they would prefer to lease with the USCG.

8.4 Step 4 - Checklist Data Entry

A checklist is provided to record the responses to the Renewal Letters and also to record any modifications to the rent and utilities on those leases.

The data contained in the checklist is used to create new data and update old records in HMIS when the fiscal year starts. It is also used to create the FINCEN reports. This step is not optional.

Perform the following steps to complete the checklist:

8.4.1 Select **Checklist Data Entry II (AHA)** from the Fiscal Year Renewal Process Menu.

The Checklist Data Entry II (AHA) screen appears, as shown in Figure 8-7.

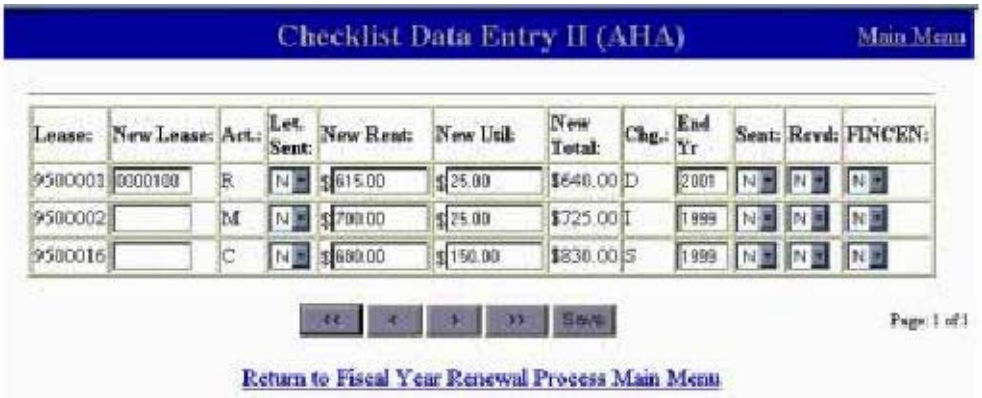


Figure 8-7 Checklist Data Entry II (AHA) Screen

8.4.2 Use Table 8-2 to determine what to enter on the checklist.

Table 8-2 Checklist Decision Table

If the Action (third column) is…	Then enter…
R	• New lease number • New rent • New utility • New ending fiscal year
M	• New rent (if changing) • New utility (if changing)
C	Nothing

8.4.3 Continue this process until all data entry for each page is complete. Click **Save** before leaving each page

NOTE: *If the action desired (modify, renew, or cancel) has changed, you must return to Step 2 – Criteria for Renewal and change the action for the change to appear correctly in this checklist.*

8.4.4 When finished with all data entry, click **Return to Fiscal Year Renewal Menu**.

CAUTION: You should complete all data entry before proceeding to print either leases or modifications.

8.5 Step 5 – Print Checklist Report

This step provides a printed copy of the Fiscal Year Checklist. After changes in the checklist, you should perform this step.

The printed checklist helps verify the data in HMIS is accurate and can be annotated when letters are received from the lessors and used to expedite the data entry of Checklist Data Entry II.

Perform the following steps to print the checklist report:

8.5.1 Select **Print Checklist** from the Fiscal Year Renewal Process Menu.

8.5.2 Click the **Printer** icon to send the report to your default printer.

Figure 8-8 displays a sample printed checklist.

AHA 01
1999/05/17

Print Checklist Data Entry
AHA 01

New Lease #	Old Lease #	FY Letter Sent	FY Action	New Rent	New Utility	Change	Option Year	Sent	Received	Done
	9500002	NO	M	$700.00	$25.00	I	1999	NO	NO	NO
	9500016	NO	C	$680.00	$150.00	S	1999	NO	NO	NO
0000100	9500001	NO	R	$615.00	$25.00	D	2001	NO	NO	NO

Figure 8-8 Sample Printed Checklist

8.6 Step 6 - Print New Fiscal Year Leases

This step simplifies the printing of new leases for the fiscal year. When the new leases are printed, the values printed on the contracts will be those that were entered in checklist data entry.

Perform the following steps to print the new fiscal year contracts:

8.6.1 Select **Print New Fiscal Year Leases** from the Fiscal Year Renewal Process Menu.

8.6.2 Use Table 8-3 to decide your course of action.

Table 8-3 Print New Fiscal Year Leases Decision Table

If you want to print…	And…	Then…
one lease	all of the data entry is complete for that lease	enter a New Lease Number and click **Print**. Go to *Step 3, Fiscal Year Renewal Letters*.
one lease	all of the data entry is NOT complete for that lease	you must complete *Step 4, Checklist Data Entry*, before proceeding.
all leases	all of the data entry is complete	click **Print**.
all leases	all of the data entry is NOT complete for ALL leases	you must complete *Step 4, Checklist Data Entry*, before proceeding.

8.6.3 Check leases for accuracy prior to mailing out for lessor signature.

8.6.4 Click the **Printer** icon to send the report to your default printer.

NOTE: *After printing the leases, the checklist is automatically updated. In all leases with an action of **R**, the **Letter Sent** column will be updated to **Y**. If you need to print a batch of leases again, you must manually reset the **Letter Sent** to **N**.*

8.7 Step 7 - Print Fiscal Year Modifications

This step simplifies the printing of any modifications (except cancellations) for the fiscal year. When the modifications are printed, the new rent and utility amounts will be printed on the modifications, and the effective date will be set to October 1.

Perform the following steps to print the new modifications:

8.7.1 Select **Fiscal Year Modifications** from the Fiscal Year Renewal Process Menu.

8.7.2 If you want to print one modification and all of the data entry is complete, enter the *Lease Number* and click **Print**. If you want to print all modifications and all of the data entry is complete, enter the *Lease Number* and click **Print**.

8.7.3 Check modifications for accuracy prior to mailing out for lessor signature.

8.7.4 Click the **Printer** icon to send the report to your default printer.

NOTE: *After printing the modifications, the checklist is automatically updated. In all leases with an action of **M**, the **Letter Sent** column will be updated to **Y**. If you need to print a batch of modifications again, you must manually reset the **Letter Sent** to **N**.*

After printing the leases and modifications, and prior to completing the last step of the Fiscal Year Process, the rest of the checklist must be completed.

Use Table 8-4 to set the columns in the checklist.

Table 8-4 Checklist Data Entry II (AHA) Column Purposes

Column	Purpose
Sent	Set to **YES** when either the lease or modification has been sent to the lessor for signature
Rcvd	Set to **YES** when the lease or modification has been returned from the lessor
FINCEN	Set to **YES** when the lease or modification has been sent to FINCEN

*NOTE: All of the columns should be set to **YES** before October 1 in accordance with the* Housing Manual *and the* FINCEN/Housing Leasing SOP. *If the columns are not set to **YES**, the last step in the Fiscal Year Process will not work.*

8.8 Step 8 - Copy Fiscal Year Data Process

This step copies the new fiscal year data to the database. This function should be performed no sooner than October 1 and no later than October 5. This function will mass update the system as follows: for leases that renewed the New Lease Number, the new Option Year, the new Rent and Utilities will be transferred to the current fields. A history record will be created for each of those leases that have been renewed. This copy process should be the last step performed in the Fiscal Year Renewal Process. At the end of this copy process, two reports are printed: the Post Reset Report and the New Contract Numbers Report.

The Post Reset Report prints the new lease data after the Copy Fiscal Year Data Process is complete. You may use this report to confirm that the lease values are correct.

The New Contract Numbers Report should be forwarded to the LHAs so they can verify the existence of the new lease numbers in their database after they have performed their Copy Fiscal Year Data Process.

Perform the following the steps to copy the new fiscal year data to the current data:

8.8.1 Select **Fiscal Year Renewal Process** from the Main Menu.

8.8.2 Select **Copy Fiscal Year Data Process** from the Fiscal Year Renewal Process Menu.

8.8.3 If you did not specify **Yes** in the **Done** field on all the housing unit leases on the Fiscal Year Checklist Data Entry scroller, a message will appear asking if you wish to continue. Press **Y**es at the **`Are you sure you want to continue?`** prompt.

9. VIEWING, PRINTING, AND SAVING REPORTS

Reports required by Commandant, as well as user-requested reports, are available within HMIS. They perform a wide variety of functions and provide data to support Owned, Leased, and ISSA Housing. The following is a summary of some of the various reports found within HMIS:

- Monthly leased housing cost statistics
- Monthly statistics and detailed listing of leases acquired
- Monthly statistics and detailed listing of leases canceled
- Listings of active leases
- Owned and ISSA Housing Inventories
- Leased, owned, and ISSA Vacancy reports
- Statistical and detailed reports of damage claims, recoupments and appeals
- Detailed occupant listings
- Listing of vacancies and occupancies used to start/stop BAH.

All users, except UPH Managers and Watchstanders, can run housing reports. User level will determine the bulk of the report. For example, running a monthly report will provide the following:

- HR User - Only the housing they are responsible for
- LHA User - All of the housing they are responsible for, including any subordinate HRs
- AHA User - All of the housing they are responsible for, including all subordinate LHAs and HRs
- MLC User - All of the housing that falls within either MLCLANT or MLCPAC
- HQ User - All of housing.

CAUTION: Some of the reports are very lengthy; review the document on screen to determine whether to print the entire document or parts.

9.1 Report Toolbar

All reports are displayed on the screen with a Report Toolbar (see Figure 9-1), which contains options to browse through the report, print the report, change printers, search for data, change the view size, and export the report to an external file.

Figure 9-1 Report Toolbar

Table 9-1 lists the toolbar elements and their descriptions.

Table 9-1 Report Toolbar Descriptions

Toolbar Element	Description
	Clicking on the left or right arrow moves from page to page in the on screen report.
1 of 1+	The center 1 of 1+ displays how many pages are in the report.
	Clicking on the Printer prints the report to the default printer.
	Clicking on Printer Setup sets up printer configuration, changing printer, and so on.
	Clicking on the Lightning Bolt refreshes the report.
	Clicking on Envelope sends the report to a file.
70%	Clicking on the arrow next to the Zoom Control box, then clicking the page % zooms the report on the screen.
	Typing in Search Criteria in the space provided, then clicking the binoculars finds the search criteria within the report.
Total:48 100%	Displays total Records of the report that are on the current screen.

9.2 Running Reports

Perform the following steps to run any report:

9.2.1 Select the report that you wish to run.

9.2.2 Enter any required entries, such as dates.

NOTE: *Dates must be entered as* YYYYMMDD*, for example 20011225.*

9.2.3 Click the **Print Report** option for reports that require input parameters. Otherwise, simply select the link to run the report.

You are prompted to wait while the report runs. All reports appear, as shown in Figure 9-2.

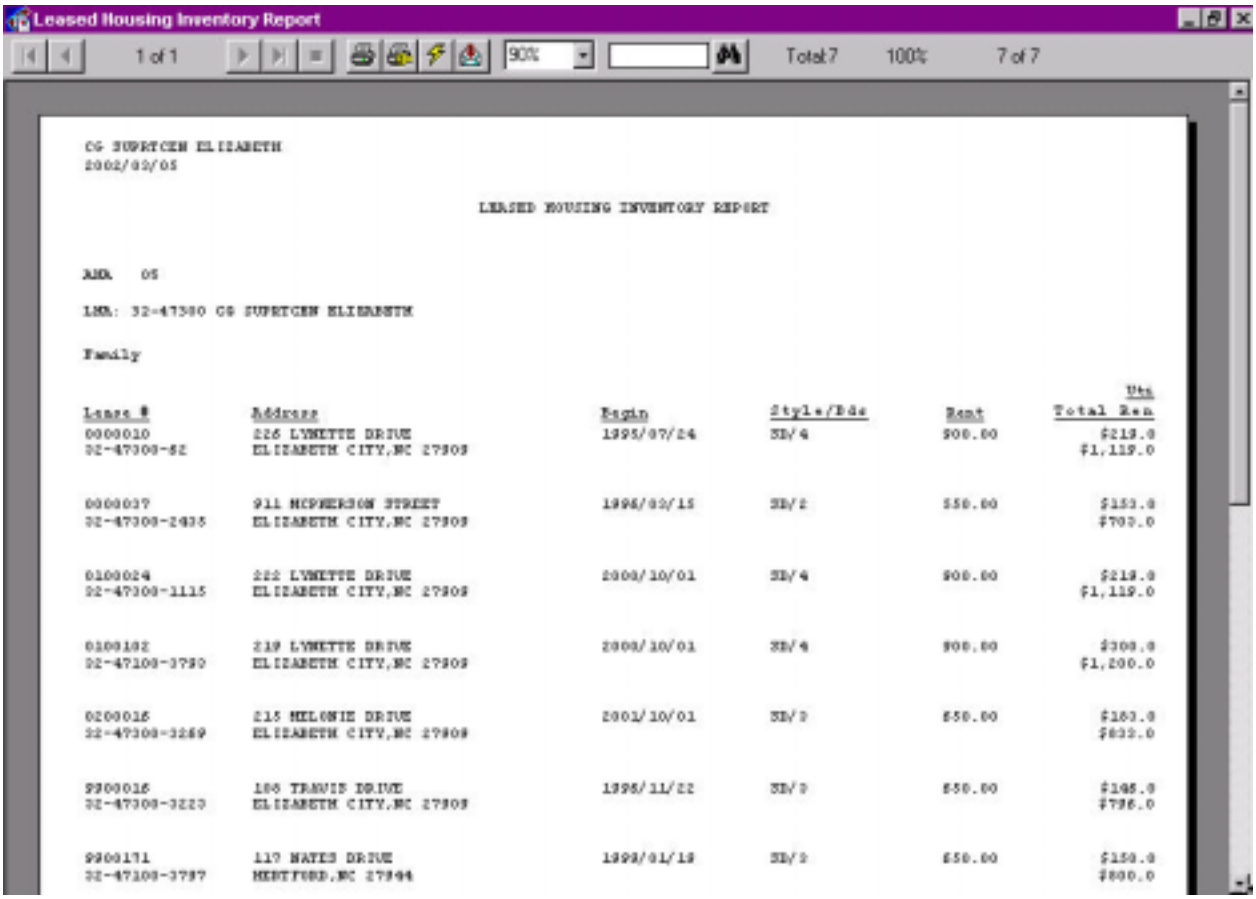


Figure 9-2 Sample Report

9.3 Printing Reports

Perform the following steps to print any report:

9.3.1 While the report is on the screen, click the **Printer** icon.

9.3.2 Click **ALL** to print all pages or select individual pages (see Figure 9-3).

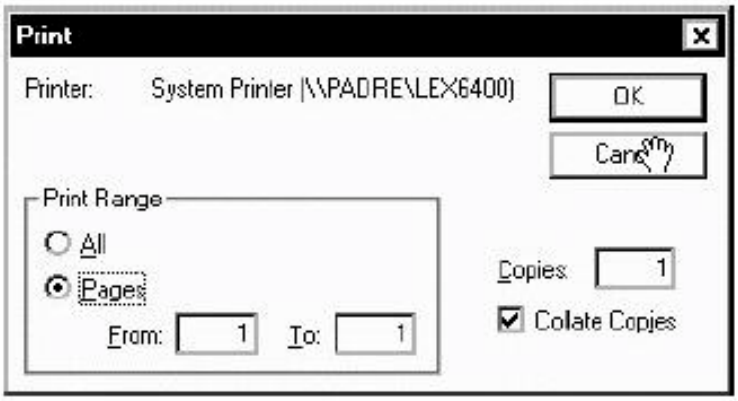


Figure 9-3 Print Dialog Box

9.3.3 Click **OK**.

NOTE: *To change your printer, click on the second Printer icon, and select the appropriate printer.*

9.4 Exporting Reports

Perform the following steps to export any report:

9.4.1 While the report is on the screen, click the **Export** icon (an envelope).

9.4.2 Click the **Format** list box to display file formats, as shown in Figure 9-4.

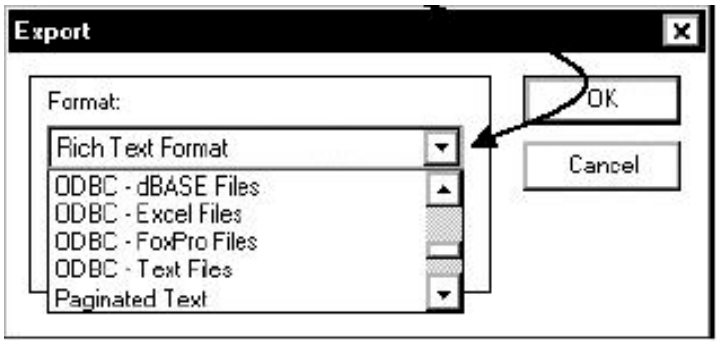


Figure 9-4 Export Dialog Box – Format List Box

The following format options are available from in Export dialog box:

- Character separated values
- Comma Separated Values
- Crystal Reports
- Data Interchange Format
- Excel 2.1
- Excel 3.0
- Excel 4.0
- Excel 5.0
- Excel 7.0
- Excel 8.0
- HTML 3.0
- HTML 3.2
- LOTUS 1-2-3
- ODBC
- Paginated Text
- Rich Text Format
- Tab separated text
- Tab separated values
- Text
- Word for Windows.

9.4.3 Select one of the available formats.

9.4.4 Click the **Destination** list box and select **Disk File** (see Figure 9-5).

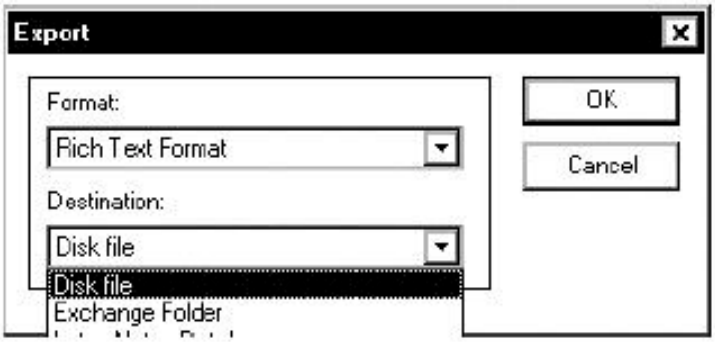


Figure 9-5 Export Dialog Box – Destination List Box

9.4.5 Click **OK**.

9.4.6 Select your personal working area to save the file.

9.4.7 Click **Save**.

10. HOUSING REPORTS

The reports contained within HMIS, with few exceptions, resulted from user requests. Exceptions are the vacancy, inventory, monthly, and PERSRU In/Out reports that are required to be available in a particular format for submittal to Headquarters. Some reports requiring a date range will only calculate correctly using a month date range. Each housing report in this section identifies the required date formats. Results of all reports are linked to the user's AOR. For example, AirStation Cape Cod results will only provide data relevant to units managed by the air station, while ISC Boston will receive data relevant to the entire AOR.

NOTE: *Follow the procedures in* Section 9, Viewing, Printing, and Saving Reports *to view, print, and save the reports in HMIS. Refer to Appendix I to navigate to a particular report.*

10.1 Leased Housing Inventory Report

The Leased House Inventory Report provides a detailed, descriptive listing of the leased housing inventory. Only those leases with an active status (as opposed to canceled or converted) will be reported. The Leased House Inventory Report includes a total of units by type of housing by LHO.

10.1.1 Report Information

The following field information is provided in this report:

- AHA
- LHA
- Type of Lease (family/UPLH)
- Lease #
- Address (city, state, zip)
- Start Date
- Style
- Bedrooms
- Rent
- Utilities.

For UPLH, the **Current In Date** and the **Last Out Date** refer to the most current dates. This report does not list all of the bedrooms; it is intended to provide an inventory of housing units.

10.1.2 Data Entry

No data entry is required for this report.

10.2 Owned Housing Inventory Report

The Owned Housing Inventory Report provides a detailed, descriptive listing of the owned housing inventory. Only those housing units with an active status (as opposed to canceled, converted, or diverted) will be reported. This report includes a total of units by type of housing by LHA.

10.2.1 Report Information

The following information is provided in this report:

- AHA
- LHA
- Complex
- Type of Housing
- HU #
- Address
- Style
- Bedrooms
- Vacant or Occupied Status
- Designation
- Status.

The report is sorted in the following order:

1. LHA
2. Complex
3. Type of Housing
4. Designation.

For owned housing units that have been converted to UPH, the **Vacant** or **Occupied** status will indicate **O** (occupied) even if some of the bedrooms are vacant. This report does not list all of the bedrooms; it is intended to provide an inventory of housing units.

10.2.2 Data Entry

No data entry is required for this report.

10.3 ISSA Housing Inventory Report

The ISSA Housing Inventory Report provides a detailed, descriptive listing of ISSAs (other government agency housing). Only those housing units with an active status (as opposed to canceled) will be reported. This report includes a total of units by type of housing by LHA.

10.3.1 Report Information

This report provides the following information on the ISSA housing inventory:

- AHA
- LHA
- Type of Housing
- HU #
- Address
- Start Date
- Current In
- Last Out
- Rent
- Style
- Bedrooms
- Utilities.

A subtotal is provided for each LHA by complex; a grand total is provided for each AHA.

The report is sorted in the following order:

1. AHA
2. LHA
3. Type of Housing
4. HU#.

10.3.2 Data Entry

No data entry is required for this report.

10.4 Leased Housing Monthly Balance Report

The Leased Housing Monthly Balance Report is used for leased housing only. This report contains four subordinate reports:

- The Begin Type Statistics Report shows the total number of leases for the beginning of a specific month.
- The End Type Statistics Report shows the total number of leases existing at the end of a specific month.
- The Start Statistics Report shows the total number of leases started (acquired) for a specific month.
- The Stop Statistics Report shows the total number of leases stopped (canceled) for a specific month.

10.4.1 Data Entry

Enter the first day of a month and the last day of the same month when prompted (for example, Start Date: 2002/01/01 End Date: 2002/01/31). Click **Print Report**.

10.5 Complex Reports

The Complex Reports are provided to assist the Housing Manager in ensuring that data entry for the **Complex** field is consistent. This field is used particularly in Fiscal Year Renewal to identify and group leases held with a particular lessor. The field is also used in the Owned and Leased Housing Inventory Reports.

Three reports are found in the Complex Reports menu option:

- List of Complexes
- List of Complexes Sorted by LHA
- Letter to Lessor Sorted by Complex.

10.5.1 List of Complexes

The List of Complexes provides a listing of complexes. It is used primarily to validate that all field names for complex have been entered into HMIS properly.

10.5.1.1 Report Information

This report provides the following information:

- key num
- HU#
- Complex
- Address.

The report is sorted by Complex.

10.5.1.2 Data Entry

No data entry is required for this report.

10.5.2 List of Complexes Sorted by LHA

The List of Complexes Sorted by LHA provides a listing of complexes sorted by the LHA. It is the same as the List of Complexes Report except for the sorting order.

10.5.2.1 Report Information

This report provides the following information:

- AHA
- LHA
- key num
- HU#
- Complex
- Address.

A subtotal is provided for each LHA by Complex; a grand total is provided for each AHA.

This report is sorted in the following order:

1. LHA
2. Complex
3. Key Num.

10.5.2.2 Data Entry

No data entry is required for this report.

10.5.3 Letter to Lessor Sorted by Complex

The Letter to Lessor Sorted by Complex generates a letter to the lessor sorted by the LHA. It is used primarily to provide a listing of the units to the lessor and to have the lessor validate the correct addresses, lease number, and costs. To run this report, select **Reports**, **Housing Reports**, **Complex Reports**, and finally **Letter to Lessor Sorted by Complex**.

NOTE: *It is critical that the list of lessors has been verified prior to running this report; otherwise, you may get multiple letters to the same lessor.*

10.5.3.1 Report Information

This report provides the following information on the owned housing inventory:

- Letter Address to the Lessor
- Lessor 1
- Lessor 2
- Correspondence Address
- Complex Name
- Address of Lease
- City, State, Zip of Lease
- Lease Number
- Rent Utilities
- Begin Date.

A subtotal is provided for each lessor.

This report is sorted in the following order:

1. Complex
2. Lessor.

10.5.3.2 Data Entry

To run this report, enter information into fields in the Print Letter to Lessor Information screen (see Figure 9-6).

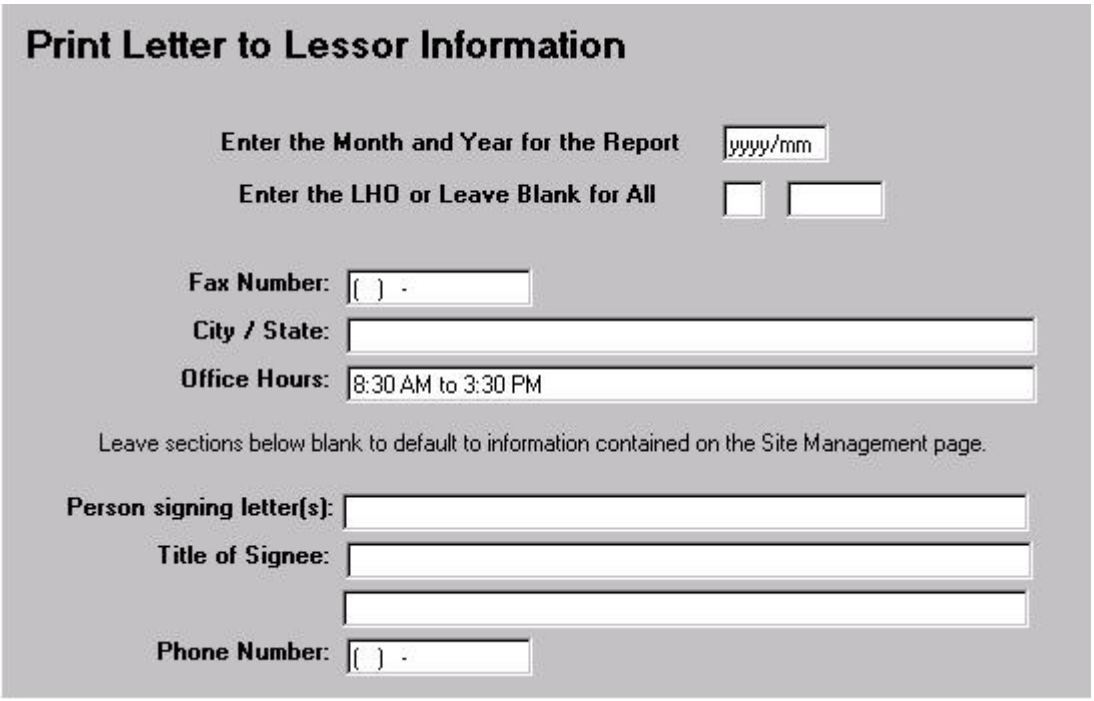


Figure 9-6 Print Letter to Lessor Information Screen

10.6 Obligation Report

The Obligation Report produces a listing of leases that are effective during a monthly period, including those that may have canceled in mid-month and those that were acquired in mid-month. This report is especially useful to compare against when reconciling PES reports.

10.6.1 Report Information

This report provides the following information:

- AHA
- LHA
- Lease No. / Days
- Obligation Amount (rent plus utilities)
- Vendor
- Tax Code
- Check Mailing Address.

10.6.2 Data Entry

When prompted, enter the first day of a month and the last day of the same month (for example, Start Date: 2002/01/01, End Date: 2002/01/31), then click **Print Obligation Report**.

10.7 LHA/BR Report

The LHA/BR Report provides summary information for leased housing by bedroom by LHA.

10.7.1 Report Information

This report provides the following information:

- Bedroom Size
- Total # of Units of that Bedroom Size
- Total and Average of Utilities
- Total and Average of Rents
- Total and Average of Rents plus Utilities.

A subtotal is provided for each LHA; a grand total is provided for each AHA.

This report is sorted in the following order:

1. LHA
2. Bedroom Number.

10.7.2 Data Entry

No data entry is required for this report.

10.8 BR/LHA Report

The BR/LHA Report provides statistical bedroom information for an AOR.

10.8.1 Report Information

This report provides the following information:

- Bedroom #
- LHA
- # of Units
- Total Rent and Utilities
- Average Rent and Utilities.

A grand total is provided for each bedroom size AHA.

This report is sorted in the following order:

1. LHA
2. Bedroom Size.

10.8.2 Data Entry

No data entry is required for this report.

10.9 Leases Started Report

The Leases Started Report shows the total number of leases that were started for a specific month plus the information listed below.

10.9.1 Report Information

This report provides the following information:

- AHA
- LHA
- Lease #
- Begin Date
- Days in Effect
- Daily Costs
- Total Costs
- Number of Bedrooms
- Bedroom Days.

A grand total of units, days, daily costs, costs, bedrooms, and bedroom days is provided for each AHA.

10.9.2 Data Entry

Perform the following steps:

10.9.2.1 Enter the month ending date that you wish to report on (for example, End Date: 2002/01/31).

10.9.2.2 Enter an LHO (for example, LHO: 01 20115), or leave the field blank for all.

10.9.2.3 Click **Print Leases Acquired Report**.

10.10 Leases Stopped Report

This report shows the total number of leases that were canceled for a specific month plus the information listed below.

10.10.1 Report Information

This report provides the following information:

- AHA
- LHA
- Lease #
- Cancel Date
- Paid Days
- Obligation Amount
- Unpaid Days
- Unpaid Costs
- Bedroom Days.

A grand total of units, days, daily costs, costs, bedrooms, and bedroom days is provided for each AHA.

10.10.2 Data Entry

Perform the following steps:

10.10.2.1 Enter the month ending date that you wish to report on (for example, End Date: 2002/01/31).

10.10.2.2 Enter an LHO (for example, LHO: 01 20115), or leave the field blank for all.

10.10.2.3 Click **Print Leases Cancelled Report**.

10.11 Count of Leased Housing Units Report

The Count of Leased Housing Units Report provides summary information about the leased housing type for each LHA as of today's date, reporting only active leases.

10.11.1 Report Information

This report provides the following information:

- LHA
- Type of Housing Unit
- # Number of Units by Type
- Total Rent
- Average Rent
- Total Bedrooms.

A subtotal is provided for each LHA by complex; a grand total is provided for each AHA.

This report is sorted in the following order:

1. AHA
2. LHA
3. Type.

10.11.2 Data Entry

Enter an LHO or leave the field blank for all.

10.12 Quick Address Sorted by Address Report

The Quick Address Sorted by Address Report provides occupant and address information sorted by address. This report is not for public display.

10.12.1 Report Information

This report provides the following information:

- AHA
- LHA
- Address
- Occupant
- Duty Station
- Home Phone Number
- Work Phone Number.

A subtotal is provided for each LHA by complex; a grand total is provided for each AHA.

This report is sorted in the following order:

1. AHA
2. LHA
3. Address.

10.12.2 Data Entry

No data entry is required for this report.

10.13 Quick Address Sorted by Last Name Report

The Quick Address Sorted by Last Name Report provides address and occupant information sorted by address. This report is not for public display.

10.13.1 Report Information

This report provides the following information:

- AHA
- LHA
- Address
- Occupant
- Duty Station
- Home Phone Number
- Work Phone Number.

A subtotal is provided for each LHA by complex; a grand total is provided for each AHA.

This report is sorted in the following order:

1. AHA/LHA
2. Last Name.

10.13.2 Data Entry

No data entry is required for this report.

10.14 Quick Address Sorted by LHA Report

The Quick Address Sorted by LHA Report provides occupant and address information sorted by LHA. This report is not for public display.

10.14.1 Report Information

This report provides the following information:

- AHA
- LHA
- Address
- Occupant
- Duty Station
- Home Phone Number
- Work Phone Number.

A subtotal is provided for each LHA by complex; a grand total is provided for each AHA.

This report is sorted in the following order:

1. AHA
2. LHA
3. Last Name.

10.14.2 Data Entry

No data entry is required for this report.

10.15 InBound Personnel Report

The InBound Personnel Report provides a listing of people who are scheduled to report and have applied for housing within a given period of time. If you have entered a scheduled in address on the application, it will print out on this report.

NOTE: *Only those personnel that have been entered as an applicant will appear on the report.*

10.15.1 Report Information

This report provides the following information:

- AHA
- LHA
- Service Code
- Need Date
- Name
- Bedroom Requirement
- Scheduled Address
- Work Phone Number.

This report is sorted in the following order:

1. AHA
2. LHA
3. Need Date.

10.15.2 Data Entry

When prompted, enter the first day of a month and the last day of the same month (for example, Start Date: 2002/01/01, End Date: 2002/01/31), then click **Print Inbound Personnel Report**.

10.16 OutBound Personnel Report

The OutBound Personnel Report provides a listing of people who are living in quarters and have a Rotate Date included within the date that you enter in the prompt.

10.16.1 Report Information

This report provides the following information on the owned housing inventory:

- AHA
- LHA
- Service Code
- Name
- Bedroom Living In
- Anticipated Rotation Date (based on Rotate Date)
- Lease Number
- Address
- Duty Station.

This report is sorted in the following order:

1. AHA
2. LHA
3. Anticipated Rotation Date.

10.16.2 Data Entry

When prompted, enter the first day of a month and the last day of the same month (for example, Start Date: 2002/01/01, End Date: 2002/01/31), then click **Print Outbound Personnel Report**.

10.17 All Inspections (Inspections Completed) Report

The All Inspections (Inspections Completed) Report provides a listing of all active housing units and their inspections that have been completed.

NOTE: *Be aware that this is a very long report.*

10.17.1 Report Information

This report provides the following information:

- AHA
- LHA
- HU# or Lease #
- Date Each Inspection was Completed.

No summary information is provided.

This report is sorted in the following order:

1. LHA
2. Lease #
3. HU#
4. Type of Inspection.

10.17.2 Data Entry

No data entry is required for this report.

10.18 Inspections by Type Report

The Inspections by Type Report provides a listing of inspections for a given period of time.

10.18.1 Report Information

This report provides the following information:

- AHA
- LHA
- Type of Inspection
- Lease# or Hu#
- Address
- Occupant
- Date Inspection Conducted.

A subtotal is provided for each Type of Inspection.

This report is sorted in the following order:

1. LHA
2. Complex
3. Type of Inspection
4. Lease# or HU#.

10.18.2 Data Entry

When prompted, enter the first day of the beginning period of time and the ending day that you wish to report on (for example, Start Date: 2002/01/01, End Date: 2002/05/01), then click **Print Inspections Type Report**.

10.19 Maximum Funding Report

The Maximum Funding Report provides a listing of expended funds (leases active throughout the year, those started, and those canceled) and subtracts the total from the amount that is entered on the Site Page.

NOTE: *This report does not include expenditures for damage claims or rent modifications. If your allocation is not entered on the Site Page, your result will be a negative number.*

10.19.1 Report Information

This report provides the following information:

- AHA
- LHA
- Lease #
- Lease Date
- Cancel Date
- Monthly Rent
- Total Rent Paid to Date.

A subtotal is provided for each LHA with a grand total for AHA.

This report is sorted in the following order:

1. AHA
2. LHA
3. Type of Housing
4. Lease #.

10.19.2 Data Entry

Dates default from the first day of the fiscal year to today's date. You may only change the End Date (for example, End Date: 2002/05/01). Click **Print Maximum Funding Report**.

10.20 Leases Scheduled to Cancel Report

The Leases Scheduled to Cancel Report provides a listing of leases that are scheduled to cancel. This report is based off of any lease that has a value in the **Predicted Cancel** field. If one of your leases is mistakenly on this list, delete the termination modification and/or delete the predicted cancel date. If these two actions fail, contact the OSC Hotline for assistance.

10.20.1 Report Information

This report provides the following information:

- AHA
- LHA
- Lease #
- Lease Date
- Predicted Cancel Date
- Current Occupant's SSN
- Name.

The report is sorted in the following order:

1. AHA
2. LHA
3. Predicted Cancel Date (descending).

10.20.2 Data Entry

No data entry is required for this report.

10.21 ISSAs Scheduled to Cancel Report

The ISSAs Scheduled to Cancel Report provides a listing of ISSAs that are scheduled to cancel. This report is based off of any ISSA that has a value in the **Predicted Cancel** field. If this is a mistake, remove the predicted cancel date.

10.21.1 Report Information

This report provides the following information:

- AHA
- LHA
- HU #
- Lease Date
- Predicted Cancel Date
- Current Occupant's SSN
- Name.

This report is sorted in the following order:

1. AHA
2. LHA
3. Predicted Cancel Date (descending).

10.21.2 Data Entry

No data entry is required for this report.

10.22 Exemptions for Assignment Report

The Exemptions for Assignment Report provides a listing of those applicants who have received an exemption to assignment for housing. The report is keyed from information supplied on the applicant page.

10.22.1 Report Information

This report provides the following information:

- AHA
- LHA
- Type of Exemption
- Expiration Date
- Name
- Lease Number
- Address.

A subtotal is provided for each LHA by complex; a grand total is provided for each AHA.

This report is sorted in the following order:

1. AHA
2. LHA
3. Type of Exemption.

10.22.2 Data Entry

No data entry is required for this report.

10.23 Inspection Schedule Report (Annual Inspection Schedule Report)

The Inspection Schedule Report (Annual Inspection Schedule Report) provides a listing of all persons and addresses that have a Check in Month of the month that you supply in the data entry portion of this report. The purpose of the report is to provide you with an annual inspection work list.

10.23.1 Report Information

This report provides the following information:

- AHA
- LHA
- Tenant Name
- Work Phone
- Address
- Home Phone
- Duty Station.

A subtotal is provided for each LHA by complex; a grand total is provided for each AHA.

10.23.2 Data Entry

Enter the year and month of period you wish to report on. Click **Print Inspection Schedule Report** to view the report.

10.24 Diverted Housing Report (List of all Diverted Housing)

The Diverted Housing Report (List of all Diverted Housing) provides a listing of all diverted housing. This report is particularly useful to verify if a diversion request has been approved and completed.

10.24.1 Report Information

This report provides the following information:

- AHA
- LHA
- Address of Unit
- Diverted Date
- Diverted Remarks.

10.24.2 Data Entry

No data entry is required for this report.

10.25 Pending Diversion List Report

The Pending Diversion List Report provides a listing of all housing that to be diverted by request. This report is particularly useful to verify if a diversion request has been approved and completed.

10.25.1 Report Information

This report provides the following information:

- AHA
- LHA
- Address of Unit
- Diverted Date
- Diverted Remarks.

This report is sorted in the following order:

1. AHA
2. LHA
3. Address.

10.25.2 Data Entry

No data entry is required for this report.

10.26 Lessor Report (Complex/Lessor Report)

The Complex/Lessor Report provides a listing of all leases sorted by complex and then by lessor. This report is particularly useful to ensure that both complex and lessor names are entered consistently in HMIS.

10.26.1 Report Information

This report provides the following information:

- AHA
- LHA
- Key Number
- HU#
- Lessor Name
- Address.

This report is sorted in the following order:

1. AHA
2. LHA
3. Key number
4. HU#.

10.26.2 Data Entry

No data entry is required for this report.

10.27 Census Report

The Census Report provides a detailed listing of occupant plus dependents for a given LHA, both owned and leased housing. This report is not to be distributed.

10.27.1 Report Information

This report provides the following information:

- AHA
- LHA
- Type of Housing
- Name
- Address
- Dependent Relationship
- Gender of Dependent
- Dependent Date of Birth
- Age of Dependent.

A total count of occupants, dependents, and personnel is provided.

This report is sorted in the following order:

1. AHA
2. LHA
3. Name.

10.27.2 Data Entry

No data entry is required for this report.

10.28 Weekly Working Report

The Weekly Working Report provides a listing of those units that have been turned over for either rehab or change over maintenance, and includes a date expected to be ready. The report is keyed from the Check Out Inspection page (Date Submitted to Maintenance and Date Expected to be Ready).

10.28.1 Report Information

This report provides the following information:

- AHA
- LHA
- Address of Unit
- Date Ready
- Bedroom Size
- Date House was Vacated.

This report is sorted in the following order:

1. AHA
2. LHA
3. Date Scheduled to be Ready.

10.28.2 Data Entry

No data entry is required for this report.

10.29 Detailed Alphabetical by LHO - Leased Housing Report

The Detailed Alphabetical by LHO – Leased Housing Report provides an alphabetical listing of all occupants.

10.29.1 Report Information

This report provides the following information:

- Occupant Name
- Gender
- Duty Station
- Address, City, State
- Telephone Number
- Complex
- Lease #, Type, Bedroom Size
- Complex Emergency Telephone #.

A subtotal is provided for each LHA by complex; a grand total is provided for each AHA.

This report is sorted as provided in data entry.

10.29.2 Data Entry

10.29.2.1 Select an *ATU* and *OPFAC* (or leave both blank).

10.29.2.2 Click the down arrow to change the sort. Select both **LHO and Duty Station** or **Duty Station**.

10.30 Detailed Alphabetical by LHO - Owned Housing Report

The Detailed Alphabetical by LHO - Owned Housing Report provides a detailed listing of all occupants in owned housing.

10.30.1 Report Information

This report provides the following information:

- Occupant Name
- Gender
- Duty Station
- Address, City, State
- Telephone Number
- Complex
- Lease #, Type, Bedroom Size
- Complex Emergency Telephone #.

This report is sorted as provided in data entry

10.30.2 Data Entry

10.30.2.1 Select an *ATU* and *OPFAC* (or leave both blank).

10.30.2.2 Click the down arrow to change the sort. Select both **LHO and Duty Station** or **Duty Station**.

10.31 Detailed Alphabetical by LHO – ISSA Report

The Detailed Alphabetical by LHO – ISSA Report provides a detailed listing of all occupants in ISSA housing.

10.31.1 Report Information

This report provides the following information:

- Occupant Name
- Gender
- Duty Station
- Address, City, State
- Telephone Number
- Complex
- Lease #, Type, Bedroom Size
- Complex Emergency Telephone #.

This report is sorted as provided in data entry.

10.31.2 Data Entry

10.31.2.1 Select an *ATU* and *OPFAC* (or leave both blank).

10.31.2.2 Click the down arrow to change the sort. Select both **LHO and Duty Station** or **Duty Station**.

10.32 Alphabetical by LHO Report

The Alphabetical by LHO Report provides a detailed listing of all occupants in housing.

10.32.1 Report Information

This report provides the following information

- Occupant Name
- Home Phone #
- Address.

This report is sorted as provided in data entry and by the following order:

1. AHA
2. LHA
3. Occupant Last Name.

10.32.2 Data Entry

Select an *ATU* and *OPFAC* (or leave both blank).

10.33 Alphabetical by Station Report

The Alphabetical by Station Report provides a detailed listing of all occupants in housing by duty station. This report is particularly useful to verify data entry if a person is residing in your housing and is stationed on the opposite coast.

10.33.1 Report Information

This report provides the following information:

- Occupant Name
- Home Phone #
- Address.

This report is sorted as provided in data entry and by the following order:

1. AHA
2. LHA
3. Duty Station
4. Occupant Last Name.

10.33.2 Data Entry

Select an *ATU* and *OPFAC* (or leave both blank).

10.34 Alphabetical by Last Name Report

The Alphabetical by Last Name Report provides a listing of all occupants in housing by last name.

10.34.1 Report Information

This report provides the following information:

- Occupant Name
- Home Phone #
- Address
- Duty Station.

This report is sorted as provided in data entry and by the following order:

1. Occupant Last Name
2. Duty Station.

10.34.2 Data Entry

Select an *ATU* and *OPFAC* (or leave both blank).

10.35 Alphabetical by City Report

The Alphabetical by City Report provides a listing of all occupants in a selected city or all cities.

10.35.1 Report Information

This report provides the following information:

- City
- Occupant Name
- Home Phone #
- Address
- Duty Station.

This report is sorted as provided in data entry and by the following order:

1. City
2. Occupant Last Name
3. Duty Station

10.35.2 Data Entry

Enter a *City* or leave the field blank to view all cities.

10.36 Memo to CO by Duty Station

The Memo to CO by Duty Station provides a report in the format of a memo to the Commanding Officer (CO) of all duty stations of those units you support. The memo is designed to provide information to the CO and request prompt notification when members receive PCS orders.

10.36.1 Report Information

This report provides the following information:

- Duty Station of Member
- Location of Housing Office
- Member's Name
- Member's Address.

This report is sorted in the following order:

1. Occupant Duty Station
2. Occupant Name.

10.36.2 Data Entry

No data entry is required for this report.

10.37 DOD Occupants Report

The DOD Occupants Report provides a listing of all non-USCG persons living in USCG-owned housing.

10.37.1 Report Information

This report provides the following information:

- Duty Station where housing is provided
- BAH Amount
- Name of Member
- Name
- Rank
- Address.

This report is sorted in the following order:

1. Occupant Duty Station
2. Occupant Name
3. Service Code.

10.37.2 Data Entry

No data entry is required for this report.

10.38 Leased Vacancy Report

The Leased Vacancy Report provides leased vacancy cost information for a given period of time. For family housing, vacancy costs are prorated on days vacant multiplied by daily cost. For unaccompanied housing, vacancy costs is prorated on days vacant multiplied by bedroom daily cost. Taking the monthly rent and dividing by 30 calculate daily costs. For unaccompanied housing, this is then divided by the number of bedrooms. If a housing unit has been vacant twice in this time period, it will be listed twice.

NOTE: *This report is designed to be run on a monthly basis.*

10.38.1 Report Information

This report provides the following information:

- AHA
- LHA
- Type of Housing
- Lease Number
- Bedrooms
- Still Vacant (will be zero unless still vacant at time of report)
- Lease Start Date
- Vacancy Start Date
- Vacancy End Date
- Days Vacant
- Reason Vacant/Reason Person
- Moved Out
- Lease Cancel Date
- Net Cost of Vacancy.

A subtotal for each type of housing is provided by LHA; grand totals are provided for AHA.

This report is sorted in the following order:

1. AHA
2. LHA
3. Type of Housing.

10.38.2 Data Entry

When prompted, enter the first day of a month and the last day of the same month (for example, Start Date: 2002/01/01, End Date: 2002/01/31), then click **Print Leased Vacancy Report**.

10.39 Owned Vacancy Report

The Owned Vacancy Report provides owned vacancy information for a given period of time. If a housing unit has been vacant twice in this time period, it will be listed twice.

NOTE: *This report is designed to be run on a monthly basis.*

10.39.1 Report Information

This report provides the following information:

- AHA
- LHA
- Type of Housing
- HU#
- Address
- Bedrooms
- Still Vacant (will be zero unless still vacant at time of report)
- Vacancy Start Date
- Vacancy End Date
- Days Vacant
- Reason Vacant
- Vacancy Remarks.

A subtotal for each type of housing is provided by LHA; grand totals are provided for AHA.

This report is sorted in the following order:

1. AHA
2. LHA
3. Type of Housing.

10.39.2 Data Entry

When prompted, enter the first day of a month and the last day of the same month (for example, Start Date: 2002/01/01, End Date: 2002/01/31), then click **Print Owned Vacancy Report**.

10.40 ISSA Vacancy Report

The ISSA Vacancy Report provides ISSA vacancy information for a given period of time. If a housing unit has been vacant twice in this time period, it will be listed twice.

NOTE: *This report is designed to be run on a monthly basis.*

10.40.1 Report Information

This report provides the following information:

- AHA
- LHA
- Type of Housing
- HU#
- Address
- Bedrooms
- Still Vacant (will be zero unless still vacant at time of report)
- Vacancy Start Date
- Vacancy End Date
- Days Vacant
- Reason Vacant
- Vacancy Remarks.

A subtotal for each type of housing is provided by LHA; grand totals are provided for AHA.

This report is sorted as follows:

1. AHA
2. LHA
3. Type of Housing.

10.40.2 Data Entry

When prompted, enter the first day of a month and the last day of the same month (for example, Start Date: 2002/01/01, End Date: 2002/01/31), then click **Print ISSA Vacancy Report**.

10.41 Still Vacant Leased Report

The Still Vacant Leased Report provides leased vacancy cost information as of the current date. For family housing, vacancy cost is prorated on days vacant multiplied by daily cost. For unaccompanied housing, vacancy costs is prorated on days vacant multiplied by bedroom daily cost. Daily costs are calculated by dividing the monthly rent by 30. For unaccompanied housing, this is then divided by the number of bedrooms. If a housing unit has been vacant twice in this time period, it will be listed twice.

10.41.1 Report Information

This report provides the following information:

- AHA
- LHA
- Type of Housing
- Lease Number
- Bedrooms
- Still Vacant (will be zero unless still vacant at time of report)
- Lease Start Date
- Vacate Day
- Lease Cancel Date
- Net Cost of Vacancy.

A subtotal for each type of housing is provided by LHA; grand totals are provided for AHA.

This report is sorted in the following order:

1. AHA
2. LHA
3. Type of Housing.

10.41.2 Data Entry

No data entry is required for this report.

10.42 Still Vacant Owned Report

The Still Vacant Owned Report provides owned vacancy information as of the current date.

10.42.1 Report Information

This report provides the following information:

- AHA
- LHA
- Type of Housing
- Generated Number for Amount of Records
- Address
- Bedrooms
- Still Vacant (will be zero unless still vacant at time of report)
- Vacancy Start Date
- Days Vacant
- Reason Vacant
- Vacancy Remarks.

A subtotal for each type of housing is provided by LHA; grand totals are provided for AHA.

This report is sorted in the following order:

1. AHA
2. LHA
3. Type of Housing.

10.42.2 Data Entry

No data entry is required for this report.

10.43 Still Vacant ISSA Report

The Still Vacant ISSA Report provides ISSA vacancy information as of the current date.

10.43.1 Report Information

Report information remains to be developed.

A subtotal for each type of housing is provided by LHA; grand totals are provided for AHA.

This report is sorted in the following order:

1. AHA
2. LHA
3. Type of Housing.

10.43.2 Data Entry

No data entry is required for this report.

10.44 PERSRU In/Out Report

The PERSRU In/Out Report provides a listing of those persons checking in and out of housing. It should be used to e-mail the PERSRU to either stop or start BAH. It can also be used to provide the PERSRU a report to verify that all stop/start actions have been reported and entered.

10.44.1 Report Information

This report is split into two parts: Members Occupying Housing and Members Vacating Housing.

This report provides the following information:

- AHA
- LHA
- SSN
- Unit Member Assigned to
- Name
- Pay Grade
- In Date or Out Date
- Type of Housing
- Family or Unaccompanied.

10.44.2 Data Entry

Enter the date range that you wish to report on (for example, Start Date: 2002/01/01 and End Date: 2002/01/31). If reporting on today, use yesterday's date as the Start Date. Click **Print PERSRU In/Out Report** to view the report.

10.45 Waiting List by Type Reports

The Waiting List by Type Report contains duplicate reports: internal and external (with SSN and without).

The following reports are found under the Waiting List by Type menu option:

- Leased Housing Applicants
- Owned Housing Applicants
- One/Two bedroom Waiting List
- Convenience Move Reports
- DOD Waiting Lists
- Holding Report.

10.45.1 Leased Housing Applicants Report

The Leased Housing Applicants Report provides a listing of all those on the waiting list for leased housing.

10.45.1.1 Report Information

This report provides the following information:

- AHA
- LHA
- Type of List (Family or Unaccompanied)
- List Order
- Control Date
- Need Date
- WL Bedroom
- Number of Dependents
- Applicant Name
- SSN (internal only)
- Pay Grade
- Unit Member Assigned to.

A subtotal is provided for each LHA.

This report is sorted in the following order:

1. Type of List (Family or Unaccompanied)
2. List Order
3. Control Date
4. Need Date
5. WL Bedroom.

10.45.1.2 Data Entry

No data entry is required for this report.

10.45.2 Owned Housing Applicants Report

The Owned Housing Applicants Report provides a listing of all those on the waiting list for owned housing.

10.45.2.1 Report Information

This report provides the following information:

- AHA
- LHA
- Type of List (Family or Unaccompanied)
- List Order
- WL Bedroom
- Number of Dependents
- Applicant Name
- SSN (internal only)
- Pay Grade

- Control Date
- Need Date
- Unit Member Assigned to.

A subtotal is provided for each LHA.

This report is sorted in the following order:

1. Type of List (Family or Unaccompanied)
2. Officer or Enlisted (WL designation)
3. List Order
4. Control Date
5. Need Date
6. WL Bedroom.

10.45.2.2 Data Entry

No data entry is required for this report.

10.45.3 Combined One/Two Bedroom List

The Combined One/Two Bedroom List provides a listing of all those on the combined waiting list for one and two bedroom owned housing.

10.45.3.1 Report Information

This report provides the following information:

- AHA
- LHA
- Type of List (Family or Unaccompanied)
- List Order
- Control Date
- Need Date
- WL Bedroom
- Number of Dependents
- Applicant Name
- SSN (internal only)
- Pay Grade
- Unit Member Assigned to.

A subtotal is provided for each LHA.

This report is sorted in the following order:

1. Type of List (Family or Unaccompanied)
2. Officer or Enlisted (WL designation)
3. List Order
4. Control Date
5. Need Date
6. WL Bedroom.

10.45.3.2 Data Entry

No data entry is required for this report.

10.45.4 Convenience Move Report

The Convenience Move Report provides a listing of all those who have requested and have been granted a request for a convenience move.

10.45.4.1 Report Information

This report provides the following information:

- AHA
- LHA
- List Order
- Control Date
- Type of List (Family or Unaccompanied)
- Need Date
- Applicant Name
- SSN (internal only)
- Current HU#
- WL Bedroom
- Number of Dependents
- Reason for Request.

A subtotal is provided for each LHA.

This report is sorted in the following order:

1. Control Date
2. Need Date
3. WL Bedroom.

10.45.4.2 Data Entry

No data entry is required for this report.

10.45.5 DOD Waiting List

The DOD Waiting List provides a listing of those DOD (or other service) that applies to USCG housing.

10.45.5.1 Report Information

This report provides the following information:

- AHA
- LHA
- List Order
- Applicant Name
- Unit Name
- Control Date.

A subtotal is provided for each LHA.

This report is sorted by Control Date.

10.45.5.2 Data Entry

No data entry is required for this report.

10.45.6 Holding Report

The Holding Report provides a listing of those persons who have been placed on hold on the waiting list.

10.45.6.1 Report Information

This report provides the following information:

- AHA
- LHA
- Applicant
- SSN
- Unit
- Telephone.

A subtotal is provided for each LHA.

This report is sorted in the following order:

1. LHA
2. Applicant Name.

10.45.6.2 Data Entry

No data entry is required for this report.

10.46 Waiting List Statistical Report of All Applicants

The Waiting List Statistical Report of All Applicants provides a summary total by pay grade by housing type of all applicants.

10.46.1 Report Information

This report provides the following information:

- AHA
- LHA
- Type of Housing
- Pay Grade
- Count of Applicants per Pay Grade.

A subtotal is provided for each LHA.

This report is sorted in the following order:

1. LHA
2. Type of Housing
3. Pay Grade.

10.46.2 Data Entry

No data entry is required for this report.

10.47 Scheduled Housing Assignment Report

The Scheduled Housing Assignment Report provides a listing of those applicants for whom you have tentatively scheduled an address on the Applicant page.

10.47.1 Report Information

This report provides the following information:

- AHA
- LHA
- Tentative Assignment Date
- Applicant Name
- Tentative Housing Assignment.

A subtotal is provided for each LHA.

This report is sorted in the following order:

1. LHA
2. Tentative Assignment Date.

10.47.2 Data Entry

No data entry is required for this report.

10.48 Paid Claims Report

The Paid Claims Report provides a listing of all claims that have been paid during a period. Claims must be approved to appear on this report.

10.48.1 Report Information

This report provides the following information:

- AHA
- LHA
- Lease #
- Type of Housing Unit
- # of Bedrooms
- Received Date
- Requested Amount
- Paid Amount
- Date Paid
- Reason for Claim.

This report is sorted in the following order:

1. AHA
2. LHA
3. Lease #
4. Received Date.

10.48.2 Data Entry

Enter the date range that you wish to report on (for example, Start Date: 2002/01/01 and End Date: 2002/01/31). If reporting on today, use yesterday's date as the Start Date. Click **Print Paid Claims Report** to view the report.

10.49 Recoupment Activity Report

The Recoupment Activity Report provides a listing of all claims that have been paid or recouped during a period. Claims must be approved to appear on this report.

10.49.1 Report Information

This report provides the following information:

- AHA
- LHA
- Lease #
- Type of Housing Unit
- # of Bedrooms
- Pay Grade of Person Paid
- Date Paid
- Liability Amount
- Recoup Amount
- Recoup Comments.

This report is sorted in the following order:

1. AHA
2. LHA
3. Lease #
4. Received Date.

10.49.2 Data Entry

Enter the date range that you wish to report on (for example, Start Date: 2002/01/01 and End Date: 2002/01/31). If reporting on today, use yesterday's date as the Start Date. Click **Print Recoupment Activity Report** to view the report.

10.50 Claims Pending Report

The Claims Pending Report provides a listing of all claims that are pending recoupment. Claims must be approved to appear on this report.

10.50.1 Report Information

This report provides the following information:

- AHA
- LHA
- Lease #
- Type of Housing Unit
- # of Bedrooms
- Pay Grade of Person Paid
- Pending Amount
- Claim Remarks.

This report is sorted in the following order:

1. AHA
2. LHA
3. Lease #.

10.50.2 Data Entry

No data entry is required for this report.

10.51 Reason for Claims Report

The Reason for Claims Report provides a listing of all reasons for claims including claim details during a given period of time. Claims must be approved to appear on this report.

10.51.1 Report Information

This report provides the following information:

- AHA
- LHA
- Reason for Claim
- Lease #
- Type of Housing Unit
- # of Bedrooms
- Pay Grade of Liable Person
- Requested Amount
- Paid Amount
- Date Paid
- Recouped Amount
- Date Recouped
- Closed Date.

This report is sorted in the following order:

1. AHA
2. LHA
3. Reason for Claim.

10.51.2 Data Entry

Enter the date range that you wish to report on (for example, Start Date: 2002/01/01 and End Date: 2002/01/31). If reporting on today, use yesterday's date as the Start Date.

10.52 Listing of All Claims

The Listing of All Claims provides a listing of all claims including claim details during a given period of time. Claims do not have to be approved to appear on this report.

10.52.1 Report Information

This report provides the following information:

- AHA
- LHA
- Number
- Claim Date
- Claim Amount
- Liability Amount
- SSN
- Last Name
- Approved (yes or no).

This report is sorted in the following order:

1. AHA
2. LHA
3. HU#
4. Claim Date.

10.52.2 Data Entry

Enter the date range that you wish to report on (for example, Start Date: 2002/01/01 and End Date: 2002/01/31). If reporting on today, use yesterday's date as the Start Date. Click **Print All Claims Report** to view the report.

10.53 Report of Closed Claims

The Report of Closed Claims provides a listing of all claims that have been closed out during a given period of time. Claims have to be approved to appear on this report.

10.53.1 Report Information

This report provides the following information:

- AHA
- LHA
- Number
- Closed Date
- Requested Amount
- Amount Paid to Lessor
- Recouped
- Reason for Claim.

This report is sorted in the following order:

1. AHA
2. LHA
3. HU#
4. Closed Date.

10.53.2 Data Entry

Enter the date range that you wish to report on (for example, Start Date: 2002/01/01 and End Date: 2002/01/31). If reporting on today, use yesterday's date as the Start Date. Click **Print Claim Closed Report** to view the report.

10.54 Claims Sorted by Lessor Report

The Claims Sorted by Lessor Report provides a listing of all claims sorted by the lessor for a given period of time. Claims have to be approved to appear on this report.

10.54.1 Report Information

This report provides the following information:

- AHA
- LHA
- Lessor's Name
- Claim Date
- Requested Amount
- SSN
- Last Name.

This report is sorted in the following order:

1. AHA
2. LHA
3. Lessor
4. Claim Date.

10.54.2 Data Entry

Enter the date range that you wish to report on (for example, Start Date: 2002/01/01 and End Date: 2002/01/31). If reporting on today, use yesterday's date as the Start Date. Click **Print Claims Sorted by Lessor Report** to view the report.

10.55 Claims Appeals Report

The Claims Appeals Report provides a listing of all claims appeals for a given period of time. Claims have to be approved to appear on this report.

10.55.1 Report Information

This report provides the following information:

- AHA
- LHA
- Type of Appeal (Lessor or Tenant)
- HU#
- Type
- Bedroom
- Pay Grade
- Demand Letter Date
- Claim Date
- Settlement Amount
- Liability Amount
- Appeal Date
- Appeal Settlement Amount.

This report is sorted in the following order:

1. AHA
2. LHA
3. Type of Appeal
4. HU#.

10.55.2 Data Entry

Enter the date range that you wish to report on (for example, Start Date: 2002/01/01 and End Date: 2002/01/31). If reporting on today, use yesterday's date as the Start Date. Click **Print Claims Appeals Report** to view the report.

10.56 Monthly Report

The Monthly Report provides a status report of all leased housing activities during a given month. It consists of five separate reports rolled into one.

10.56.1 Report Information

This report provides the following information:

10.56.1.1 Monthly Status Report

The Monthly Status section of the Monthly Report provides a summary sheet of the following information:

- Count of Leases at the Beginning of the Month
- Count of Leases Acquired
- Count of Leases Canceled
- Ending Month Summary.

This report also includes total by type of housing and costs.

10.56.1.2 Leases Acquired

The Leases Acquired section of the Monthly Report provides a summary by LHA of Number of Units acquired, including the following information:

- Number of Units
- Number of Days
- Rent Prorata
- Total Bedrooms
- Unoccupied Bed Days.

10.56.1.3 Leases Canceled

The Leases Canceled section of the Monthly Report provides a summary by LHA of number of units canceled, including the following information:

- Number of Units
- Number of Days
- Rent Prorata
- Total Bedrooms
- Unoccupied Bed Days.

10.56.1.4 Leases at the Beginning of the Month

The Leases at the Beginning of the Month section of the Monthly Report provides a summary by LHA of the number of units that was started with at the beginning of the month, including the following information:

- Number of Units
- Total Rent
- Average Rent
- Total Bedrooms.

10.56.1.5 Leases at the End of the Month

The Leases at the Beginning of the Month section of the Monthly Report provides a summary by LHA of the number of units that was left at the end of the month, including the following information:

- Number of Units
- Total Rent
- Average Rent
- Total Bedrooms.

10.56.2 Data Entry

Enter the date range that you wish to report on. This date range must be a month period (for example, Start Date: 2002/01/01 and End Date: 2002/01/31).

11. UPH MANAGEMENT

The UPH Management module of HMIS is used to enter description information for Barracks, Rooms, Furniture, as well as maintaining the occupancy and vacancy of the Barracks.

This section contains a discussion of the Barracks and Room screens and contains instructions for creating the inventory, occupying and vacating the beds, creating claims, and running reports.

All field definitions are provided in *Appendix A, Site Management Fields*.

The UPH Management Menu (see Figure 11-1) is accessed from the HMIS Main Menu.

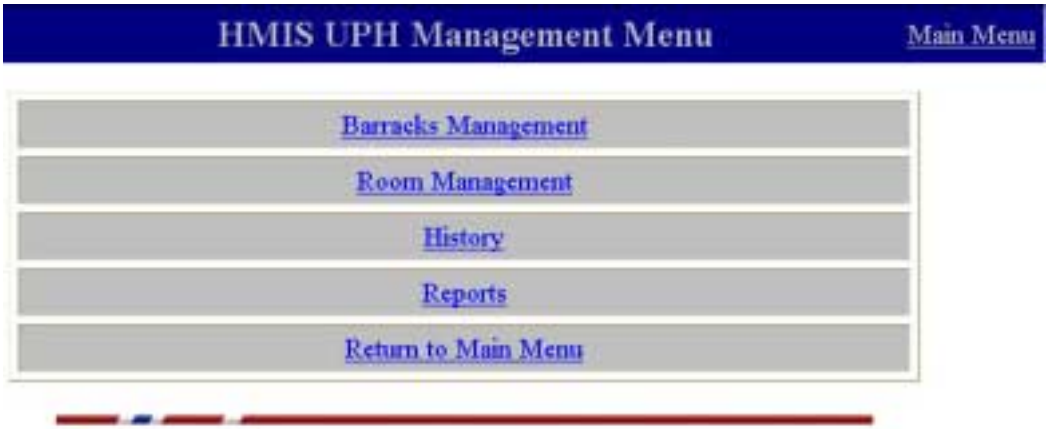


Figure 11-1 HMIS UPH Management Menu

11.1 Adding a Barracks

All Barracks should be included in the HMIS inventory; once entered, only routine changes, such as room diversions, will be required. AHO, LHO, HR, and UPH user levels may add barracks. Figure 11-2 displays the Barracks Management screen.

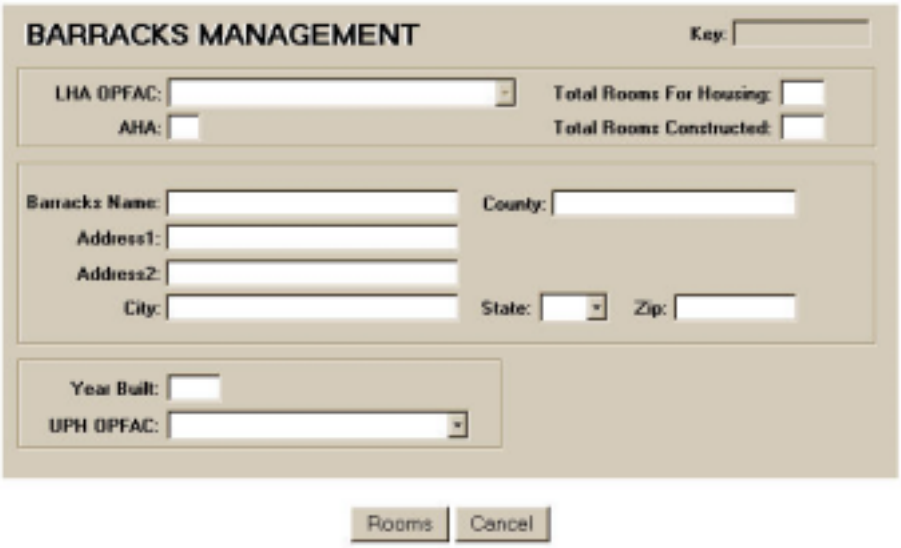


Figure 11-2 Barracks Management Screen

Perform the following steps to add a Barracks:

11.1.1 Select **UPH Management Menu** from the HMIS Main Menu.

11.1.2 Select **Barracks Management**.

11.1.3 Select **Add New Barracks**.

11.1.4 Enter the following fields:

- **LHA OPFAC**
- **Barracks Name**
- **Address1**
- **Address2**
- **City**
- **County**
- **State**
- **Zip**
- **Year Built**
- **UPH OPFAC**
- **Total Rooms Constructed**.

11.1.5 Click **Save**.

11.2 Searching for a Barracks

Perform the following steps to search for an existing Barracks:

11.2.1 Select **UPH Management Menu** from the HMIS Main Menu.

11.2.2 Select **Barracks Management**.

11.2.3 Select **Search/Modify Existing Barracks**.

11.2.4 At the next screen, click the list box and select *Barracks Name* (see Figure 11-3).

Figure 11-3 Barracks Search Screen

11.2.5 Click **Search**.

11.2.6 Click the link to the desired Barracks.

11.3 Adding Rooms to a Barracks

After a Barracks is created, each room within the Barracks must be added. As rooms are added using this function, the **Total Rooms for Housing** field on the Barracks Management screen will increment by one.

Figure 11-4 displays the Room Information Screen.

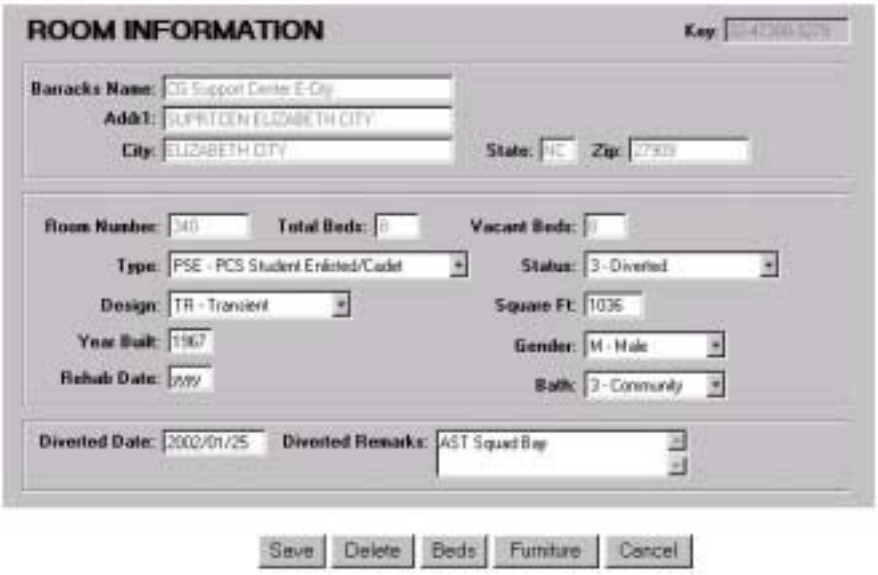


Figure 11-4 Room Information Screen

Perform the following steps to add a Room to a Barracks:

11.3.1 Select **UPH Management** from the HMIS Main Menu.

11.3.2 Select **Barracks Management**.

11.3.3 Search for and select the Barracks you wish to add a room to.

11.3.4 Click **Rooms**.

11.3.5 Click **Add New Room**.

11.3.6 Enter the following fields:

- **Room Number**
- **Type of Room**
- **Designation**
- **Year Built**
- **Sq Ft**
- **Sex**
- **Bath**.

11.3.7 Click **Save**.

11.4 Adding Beds to a Room

After Rooms have been created, Beds may be added or deleted.

Perform the following steps to add a Bed to a Room:

11.4.1 Select **UPH Management Menu** from the HMIS Main Menu.

11.4.2 Select **Barracks Management**.

11.4.3 Search for and select the desired Barracks.

11.4.4 Click **Rooms**.

11.4.5 Click **Beds**.

11.4.6 Click **Add New Bed**.

11.4.7 Enter a *New Bed Number* in the Bed Num field.

11.4.8 Click **Save**.

11.5 Adding Furniture to a Room

If desired, the furniture provided in each room may be added.

Perform the following steps to add Furniture to a Room:

11.5.1 Select **UPH Management Menu** from the HMIS Main Menu.

11.5.2 Select **Barracks Management**.

11.5.3 Search for and select the desired Barracks.

11.5.4 Click **Rooms**.

11.5.5 Click **Furniture**.

11.5.6 Click **Add Furniture**.

11.5.6 Enter the following fields:

- **Item Description**
- **Serial Number**
- **Cost**
- **Date Acquired**.

11.5.7 Click **Save**.

11.6 Personnel/Applications

Before a Permanent Party Barracks room can be occupied, the person must be contained in HMIS. All Active Duty USCG personnel information is contained in HMIS and is updated once a week by OSC Kearneysville System Support. Because of this, users must add Non-USCG Personnel (DOD, Civilian, and USCG Reservists) for the purposes of barracks assignments and must add Watch Stander Type people to be placed in duty rooms.

After ensuring the person is in HMIS, users must create an application within HMIS. An application must be created for all those personnel occupying Permanent Party Barracks.

This section provides steps to add a person, create an application, occupy and vacate a Permanent Party Barracks Room, and occupy and vacate a Transient Room.

11.6.1 UPH Personnel Screen

The UPH Personnel Information screen (see Figure 11-5) is provided to allow you to either view Active Duty USCG information relevant to housing assignments or to allow you to enter non-USCG Active Duty personnel into HMIS.

The screen is divided into three Tabs: **Personnel Information**, **Current Application/Residence Information**, and **Application/Waiting List Information**.

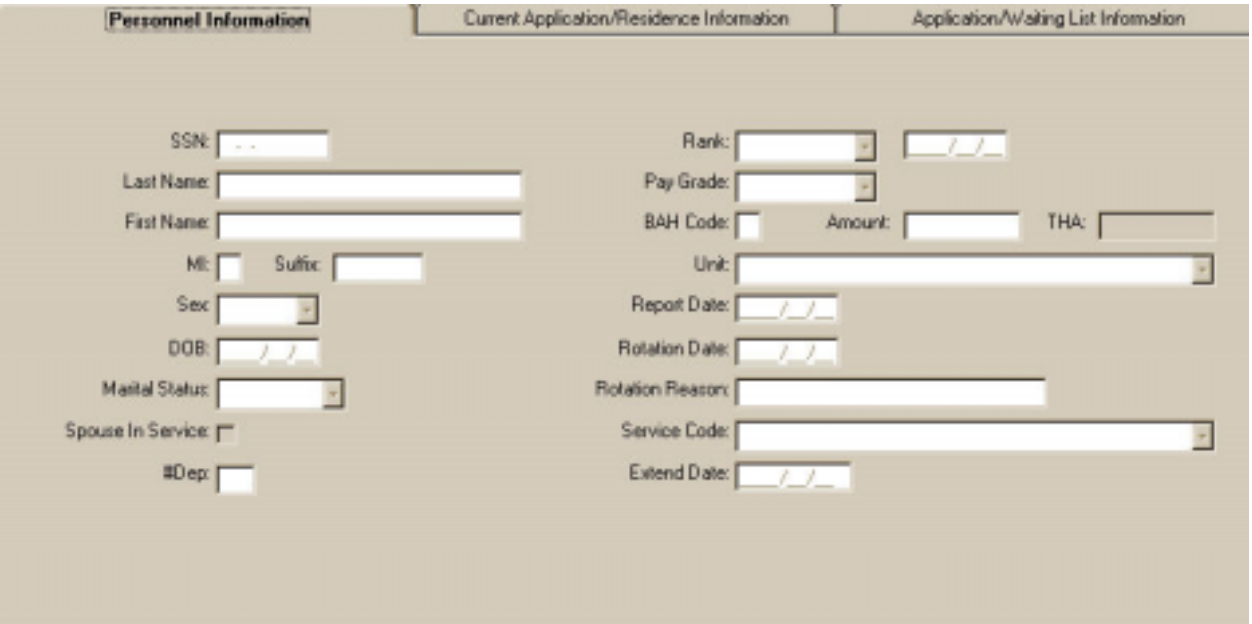


Figure 11-5 Personnel Screen

11.6.2 Adding a Person

This section provides instructions to add a person to HMIS. Active Duty USCG personnel information is contained in HMIS and is updated once a week by OSC Kearneysville System Support. Because of this, users may only add non-USCG Personnel for the purposes of housing assignments. If a USCG Active Duty person is not found in the system, call the OSC Hotline.

Perform the following steps to add a non-USCG person. Only those fields listed are required, but all may be entered.

11.6.2.1 Select **Personnel/Applicant** from the HMIS Main Menu.

11.6.2.2 Click **Add New Person**.

11.6.2.3 Enter the following information pertaining to the person:

- SSN
- Last Name
- First Name
- Sex
- # of Dependents
- Rank
- Pay Grade
- Unit
- Service Code.

11.6.2.4 Click **Save**.

11.6.3 Adding Persons to Fill Watchstander Rooms

Perform the following steps to add persons to fill watchstander rooms.

11.6.3.1 Select **Personnel/Applicant** from the HMIS Main Menu.

11.6.3.2 Click **Add New Person**.

11.6.3.3 For the SSN, take your ATU OPFAC, and add two digits to the end (start with 00). Format the result like an SSN (for example, for the first watchstander room at ISC Kodiak, the SSN would be created as follows: 3347000 plus 00; the resulting SSN would be 334-70-0000, the second SSN would be 334-70-0001).

11.6.3.4 For the Last Name, enter the type of room, and add a digit to the end (for example, for the first watchstander room at ISC Kodiak, with an SSN of 334-70-0000, the Last Name would be Watchstander1, the second last name would be Watchstander2).

11.6.3.5 For the First Name, enter as second part of the type of the room, but do not add a digit (for example, for the first watchstander room at ISC Kodiak, with an SSN of 334-70-0000 and a Last Name of Watchstander1, the First Name would be Enlisted).

11.6.3.6 For the Paygrade & Rate Rank, since this is a required field, pick the most prevalent Paygrade that would be standing duty and using the room.

11.6.3.7 Enter the rest of the required information as describe in *Section 11.6.2, Adding a Person*.

11.6.3.8 Click **Save**.

11.6.4 Creating An Application/Putting a Person on a Waiting List

The Application/Waiting List Information screen (see Figure 11-6) is provided to allow you to enter Application/Waiting List information for those persons applying for or being placed in Permanent Party Barracks. Once this is completed, you may place the person in a Barracks Room. Fewer fields are required on this screen for occupancy into barracks than in family housing.

This section provides instructions to create an application or put a person on a waiting list for Barracks (these terms are used interchangeably). This step is required before a person can be occupied in a Permanent Party Barracks Room within HMIS.

A member can live in one housing unit and have only one additional application. This allows for those persons still in housing at one duty station to submit an application for housing at another duty location.

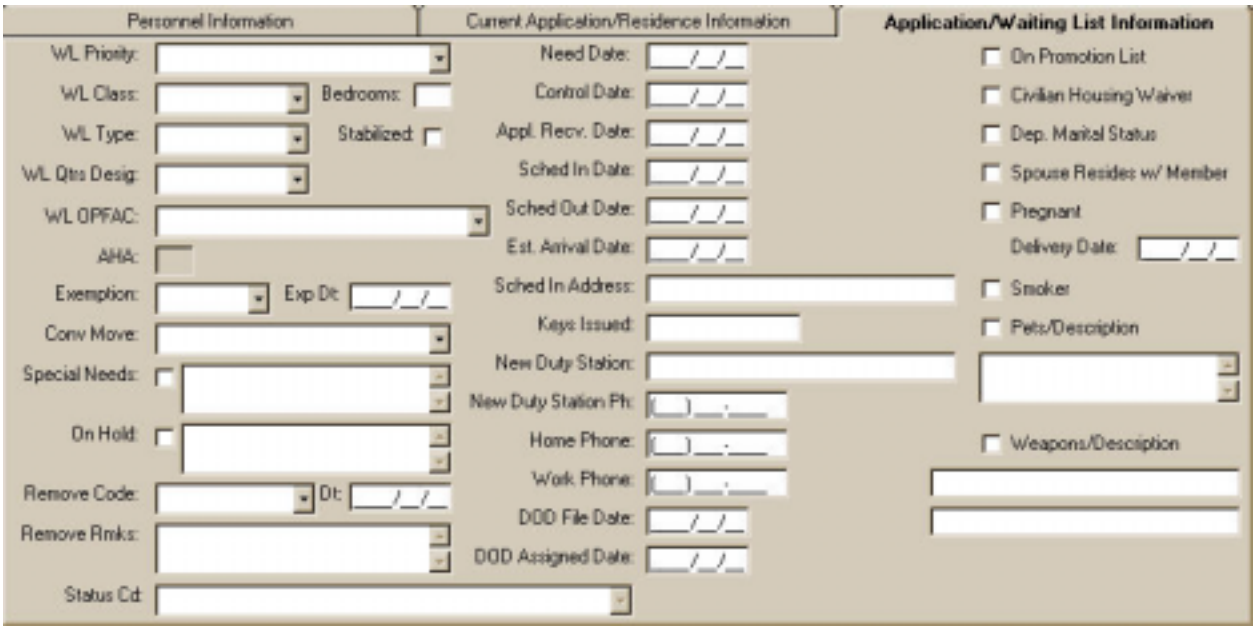


Figure 11-6 Application/Waiting List Information Screen

Perform the following steps to create an application:

11.6.4.1 Select **Personnel/Applicant** from the HMIS Main Menu.

11.6.4.2 Click **Personnel Search**.

11.6.4.3 Search for the Person either by *SSN* or *Last Name*.

11.6.4.4 Click to the link for the desired Person.

The Personnel Information Screen appears.

11.6.4.5 Ensure this is the correct Person; if it is not, perform another search.

11.6.4.6 Click the **Application/Waiting List Information** tab.

11.6.4.7 Enter the data for the following required fields following the rules listed:

- WL Class = OWNED
- WL OPFAC = OPFAC of the Barracks
- WL Type = BARRACKS
- Bedrooms = 1
- Need Date
- Control Date
- Application Received Date.

The application page MUST match the Barracks that the member is being placed in. Rules are as follows:

- The Waiting List OPFAC must match the LHO OPFAC of the Housing Unit.
- The Housing Class must match.
- The Housing Type must match (for example, Barracks Type on the Waiting List - Member is only eligible for a Barracks Room).
- Bedroom number of Application must equal one.

11.6.4.8 Click **Save**.

Although not required, each of the other fields displayed on the Application/Waiting List Information screen should be entered, if they apply. Each provides data for various reports.

11.6.5 Occupying a Permanent Party Barracks Bed

This section provides instructions to Occupy a Barracks Room. Remember that an application must have been created for the person if the person is to occupy a Permanent Party Room.

As soon as possible after an occupant is checked into Barracks, HMIS data should be entered to ensure real-time validity of system and occupancy/vacancy management. No more than two days should lapse.

Perform the following steps to Occupy a Barracks Room:

11.6.5.1 Select **Room Management** from the UPH Management Menu.

11.6.5.2 Select the **Barracks**.

11.6.5.3 Select the **Room Number**.

11.6.5.4 Select the **Bed Number** (if more than one bed).

11.6.5.5 Select **Applicant Search**.

11.6.5.6 Click **Search**.

A list of Applicants appears.

11.6.5.7 Select the Applicant that you are placing in the barracks room.

NOTE: *Once selected today's date and time will be automatically entered.*

11.6.5.8 Change the date if necessary.

11.6.5.9 Click **Occupy**.

CAUTION: Once you click Occupy**, you cannot change the** In Date**. Make sure this date is correct before clicking** Occupy**.**

11.6.6 Occupying a Transient Barracks Bed

This section provides instructions to Occupy a Transient Barracks Room. An application is not required to occupy beds in a Transient Room.

Perform the following steps to Occupy a Transient Barracks Room:

11.6.6.1 Select **Room Management** from the UPH Management Menu.

11.6.6.2 Select the **Barracks**.

11.6.6.3 Select the **Room Number**.

11.6.6.4 Select the **Bed Number** (if more than one bed).

11.6.6.5 Select **Applicant Search**. Click **All Personnel**.

11.6.6.6 Click **Search**.

A list of Applicants appears.

11.6.6.7 Select the Applicant that you are placing in the barracks room.

NOTE: *Once selected today's date and time will be automatically entered.*

11.6.6.8 Change the date if necessary.

11.6.6.9 Click **Occupy**.

CAUTION: Once you click Occupy**, you cannot change the** In Date**. Make sure this date is correct before clicking** Occupy**.**

11.6.7 Vacating a Barracks Room

This section provides instructions to Vacate a Housing Unit. As soon as possible after an occupant is checked out, HMIS data should be entered to ensure real time validity of system and occupancy/vacancy management. No more than two days should lapse. Prior to performing this step, check in and check out inspections must be completed.

Perform the following steps to Vacate a Barracks Room:

11.6.7.1 Select **Room Management** from the UPH Management menu.

11.6.7.2 Select the **Barracks**.

11.6.7.3 Select the **Room Number**.

11.6.7.4 Select the **Bed Number**.

11.6.7.5 Enter the **Time Out**.

11.6.7.6 Enter the **Date Out**.

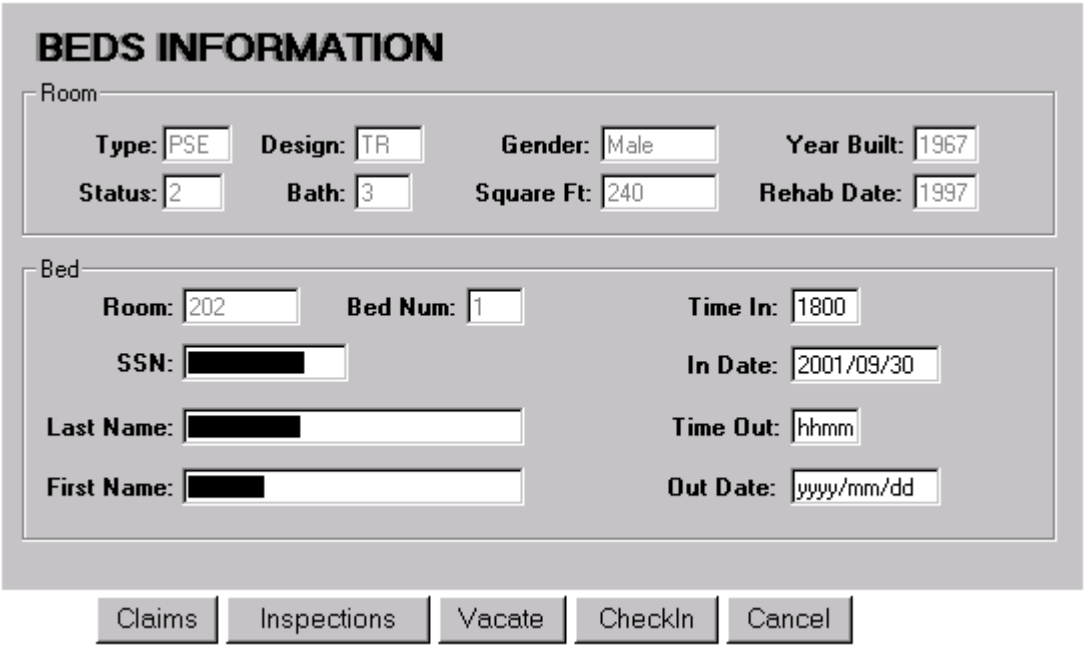


Figure 11-7 Beds Information Screen

11.6.7.7 Click **Vacate** to clear the quarters or **Cancel** if you do not want to clear quarters.

11.7 Adding a Damage Claim

Damage Claim information may be stored in HMIS for Barracks Rooms. Although it is entered, the information is not considered valid unless it is approved. This limitation is provided to ensure that claims are not counted on any reports unless they are real claims.

Perform the following steps to add a Damage Claim:

11.7.1 Select **Room Management** from the UPH Management menu.

11.7.2 Select the **Barracks**.

11.7.3 Select the **Room Number**.

11.7.4 Select the **Bed Number**.

11.7.5 Click **Claim**.

You will be prompted as illustrated in Figure 11-8.

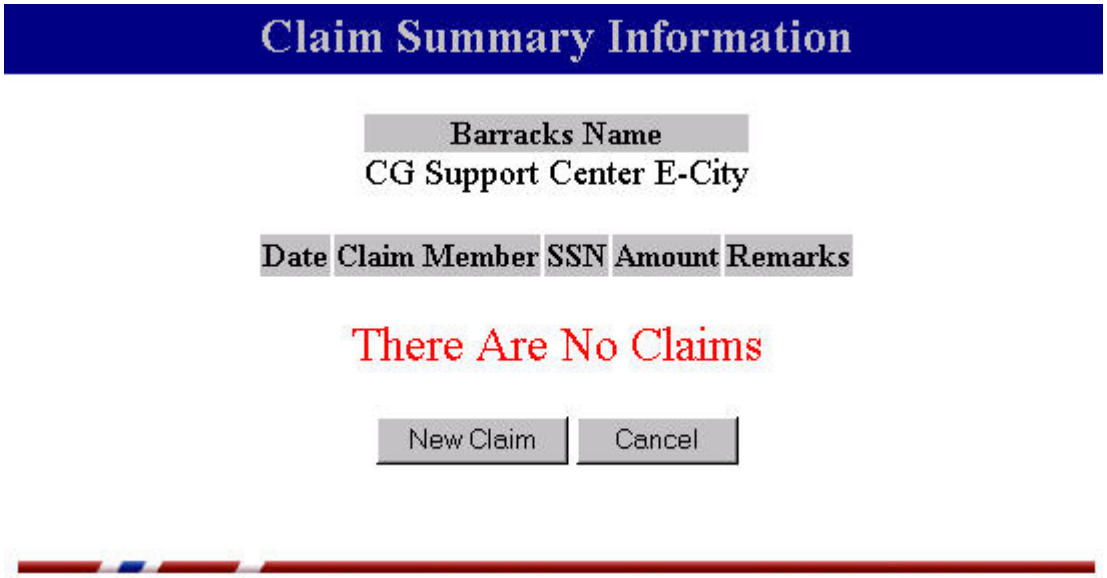


Figure 11-8 Damage Claim Prompt

11.7.6 Click **New Claim**.

The Claim Information screen appears (see Figure 11-9).

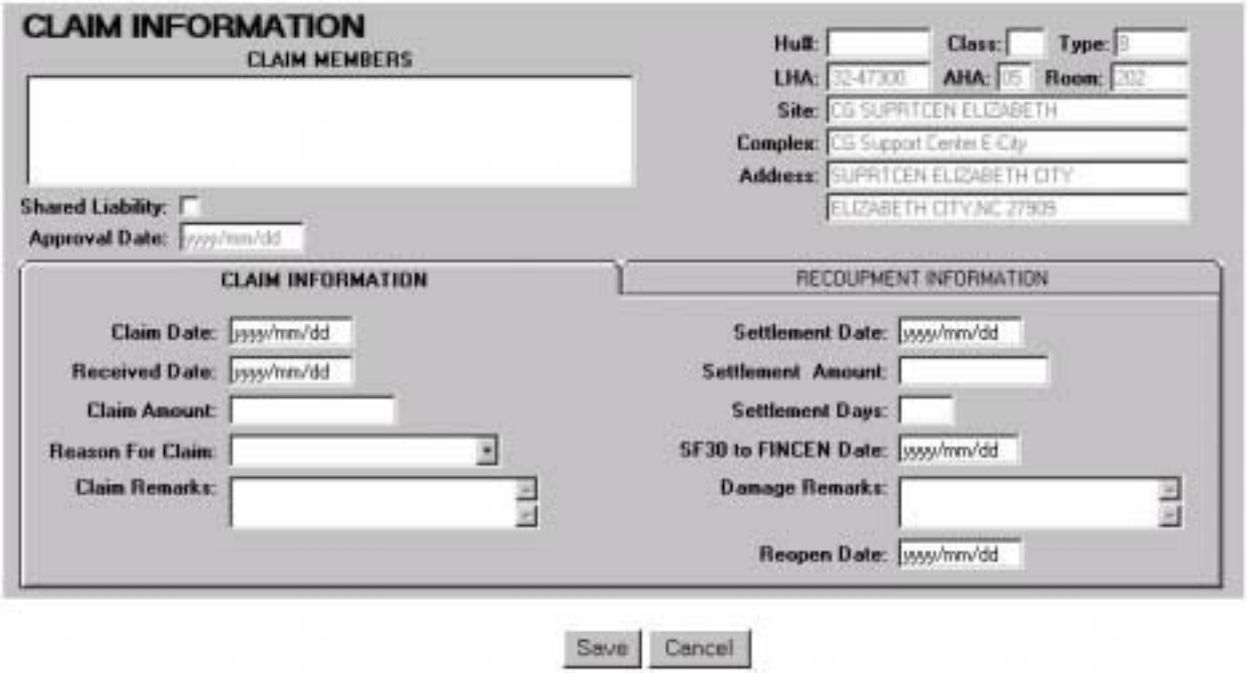


Figure 11-9 Claim Information Screen

11.7.7 Enter the following information:

- Claim Date
- Received Date
- Claim Amount
- Reason for Claim
- Claim Remarks
- Settlement Date
- Settlement Amount.

11.7.8 Click **Save**.

11.7.1 Adding a Claim Member

Once a Damage Claim is entered in HMIS, to associate it with a current or previous occupant, you must add a Claim Member to the claim.

Perform the following steps to add a Claim Member to a Damage Claim:

11.7.1.1 Retrieve the Damage Claim.

11.7.1.2 Click **Members**.

A message appears indicating **`There are No Members Associated with the Claim.`**

11.7.1.3 Click **New Member**.

A claim member search screen appears.

11.7.1.4 Click **Last Name**, and enter the last name of the person responsible for the claim.

11.7.1.5 Select either **Search by Housing History** if the person is in HMIS History or **Search by All Housing** if the person is not in HMIS History.

11.7.1.6 Click **Search**, and when the search results screen appear, click on the appropriate person.

A screen appears with the member's SSN, Last Name, First Name, and Middle Initial.

11.7.1.7 Enter the following information:

- Liability Amount
- Demand Date
- Payment Type
- Payment Status
- Member Settlement Date
- Member Settle Amount.

11.7.1.8 Click **Save** to save the record.

11.7.2 Adding Damage Claim Recoupment

Recoupment information should be entered for all claims. The system will automatically calculate processing days for claims after the closed date is entered and will also calculate the percent recouped from the member.

There is a provision for allowing shared liability for the claim.

Perform the following steps to add Recoupment information for a Damage Claim:

11.7.2.1 Select **Room Management** from the UPH Management menu.

11.7.2.2 Select the **Barracks**.

11.7.2.3 Select the **Room Number**.

11.7.2.4 Select the **Bed Number**.

11.7.2.5 Click **Claims**.

11.7.2.6 Click on the link to the desired Damage Claim.

11.7.2.7 Click on the **Recoupment** tab.

11.7.2.8 Enter the following information:

- The *Recoupment Amount*
- The date the claim is considered closed (the claim is closed when PAA is sent to HRSIC)
- Any recoupment remarks.

11.7.2.9 Click **Save**.

11.7.3 Adding a Tenant Appeal

If a member appeals the damages assigned to him/her, the appeal information is entered into HMIS.

Perform the following steps to add a Tenant Appeal:

11.7.3.1 Search for the Barracks.

11.7.3.2 Click on the link to the desired Barracks.

11.7.3.3 Select **Claims**.

11.7.3.4 Click on the link to the desired Damage Claim.

11.7.3.5 Click on the **Recoupment** tab.

The Tenant Appeal Information Screen appears.

11.7.3.6 Click **Tennant Appeal**.

11.7.3.7 Click **New Appeal**.

The Appeal Information screen appears.

11.7.3.8 Enter the following information:

- In the **Appeal Date** field, enter the date of the member's appeal.
- In the **Claim Member** field, select the member from the drop down box.
- In the **Appeal Settle Amount** field, enter the amount that is finally settled for the member to pay.

11.7.3.9 Click **Save**.

11.8 UPH Reports

This section provides a description of the UPH Reports and instructions on how to run them.

The reports are selected from the UPH Main Menu. The following reports are provided for UPH Management:

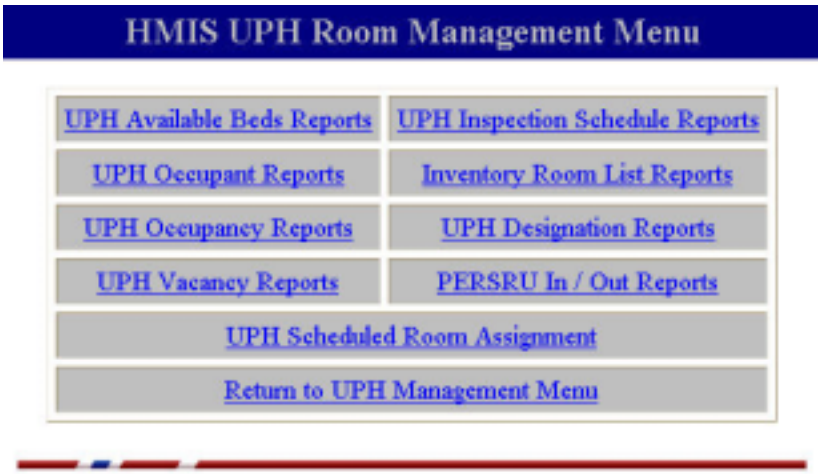


Figure 11-10 UPH Room Management Menu

Table 11-1 provides a brief description of each report:

Table 11-1 UPH Management Report Descriptions

Report Name	Description
UPH Available Beds	Provides a list of all available beds for the UPH Barracks sorted by barracks
UPH Occupant	Provides a list of all barracks occupants sorted by barracks; may be run with or without SSNs
UPH Occupancy	Calculates the Occupancy % for either Permanent Party rooms or Transient Party rooms for a period of time
UPH Vacancy	Calculates the Vacancy % for either Permanent Party rooms or Transient Party rooms in the barracks for a period of time
UPH Inspection Schedule	Provides a list of scheduled inspections for an individual inspector or for all inspectors
Inventory Room List	Provides a list of the rooms within a barracks along with the current occupant information
UPH Designation	Provides a list of the rooms with a barracks sorted and totaled by room type and designation
PERSRU In/Out	Provides a list of people that have either occupied or vacated quarters within a date range Used to send to PERSRU to stop or start allowances
UPH Scheduled Room Assignment	Provides a list of applicants and their scheduled room assignments This report will only print out those applicants who have an application and those that have a scheduled room assignment

APPENDIX A

SITE MANAGEMENT FIELDS

Table A-1 Site Management Fields

Field	Description
Site OPFAC	The ATU and OPFAC of the site; this is linked to users (for example, if you are an ISB Boston AHO user, then your ATU & OPFAC will be that of ISC Boston)
Site no	Contracting Site assigned to the AHO & AHO area of responsibility; used to create leases and lease modifications
AHA	AHA number assigned (for example, 01 - Boston; 02 - ISC St. Louis; 04 – TRACEN Cape May; 05 - ISC Portsmouth; 07- ISC Miami; 08 - ISC NOLA; 09 – ISC Cleveland; 11 - ISC San Pedro; 12 - ISC Alameda; 13 - ISC Seattle; 14 – ISC Honolulu; 15 - TRACEN Petaluma; 16 - ISC Ketchikan; 17 - ISC Kodiak)
FINCEN	System generated number based on Current Fiscal Year; used to create leases and lease modifications
Site Type	Identifies if site is an AHA, LHA, HR, UPH, MLC or HQ site - as described in *Section 1, System Overview*
Program Element	Number assigned to each Leased Housing Contracting Site; used to create leases and lease modifications
Parent OPFAC & Type	Parent OPFAC used in HMIS; used to identify reporting hierarchy; MLCs implied to be parents, however HQ is identified
Last Hu Seq	System generated unique housing record identifier
Out of Pocket	Percentage of out of pocket expenses for member; entered at HQ level only
Doc Type No	Always **40**; signifies leases and is used to create leases and lease modifications
Current Fiscal Year	The current fiscal year; should be changed Oct 1 of each year; used to create leases and lease modifications
Cont Officer	Name of the leased housing contracting offer; used to create leases and lease modifications
Site Address	Four lines to enter the site address and telephone; prints on the leases and lease modifications; must be correct on the AHA site for leases to print out correctly
Max Funding Level	Yearly Lease Allocation; used to track expenditures

APPENDIX B
HOUSING UNIT FIELDS

Table B-1 Housing Unit Fields

Field	Description	
HU#	A number assigned to each housing unit; this number is always 7 digits in length and is created by the AHO user as follows:	
	HU Class	Number Format
	Leased	Last two digits of the FY acquired + 000 + last 3 digits of contract # (for example, 95000365)
	Owned	Begins with the letter G + 000 + a 3 digit number assigned to the housing unit (for example, G000249)
	ISSA	Begins with the letter I followed by ISSA# + 3 or 4 digit # (for example, I101001)
HUOPFAC	Clicking on the down arrow will display all possible units; enter HUOPFAC using the following guidelines:	
	HU Class	Directions
	Leased	The ATU and OPFAC of the Unit that is supported by the lease; if multiple units are supported by the lease, then the OPFAC of the LHA should be entered
	Owned	The ATU and OPFAC of the Housing Site if located on a CG facility; if the housing site is not located on a USCG facility, enter the OPFAC of the LHA that manages the housing facility
Complex	A field used to sort and produce reports that perform counting functions, cost calculations, and so on. Once a Complex is associated with an apartment complex, owner, or an owned housing site, use the same E complex when entering additional data associated with that apartment complex, owner, or owned housing site. Enter Complex as follows:	
	Type of House	Assign Complex As
	Lease with an apartment complex	The name of the complex (for example, Oakbrook Apts)
	A lease with a single owner	An abbreviated lessor name (for example, Smith, J)
	Owned Housing	Site Name as identified in Housing Manual Enclosure; typically is the city location of the housing unit

Field	Description
Address	2 lines - the first and second (if applicable) line of the housing unit street address; as a rule, enter all of the address in the first line
City	The City where the housing unit is located
State	The State abbreviation for the housing unit location
Zip	The Zip code for the housing unit location
County	The County where the housing unit is located
Cong. Dist.	The two digit field for the Congressional District of the city where the housing unit is located (for example, 02, 05, 12)
Non CG Member Assigned	A system generated checkbox that is automatically checked when a member is assigned to a housing unit and has a Service Code that is not USCG
Option YR	The Fiscal Year that a leases expires; use format of YYYY (for example: 2002, 2003, 2004)
Class	Describes the class of housing; clicking on the arrow provides these three choices: Leased (L), Government Owned (G), or ISSA (I)
Desig	The designation code established for Owned Housing; designations are approved by Commandant (G-WPM-4); clicking the arrow provides the following choices:

Code	Designation	Code	Designation
A	Flag	G	Junior Enlisted
B	Command	H	Officer
C	Captain	I	Enlisted
D	Senior Officer	J	Non-Rate
E	Junior Officer	O	Other
F	Senior Enlisted		

Bdrms	The total number of bedrooms in the housing unit
Baths	The total number of bathrooms in the housing unit (for example, 1, 1.5, 2, 2.5)
Total Rms	The total number of rooms in the housing unit minus bathrooms
Sq. Ft	The square footage of housing unit's living area
$ Sq. Ft	A leased or ISSA Housing unit's monthly rent divided by the housing unit's total square footage; system generated

<table>
<tr><th>Field</th><th colspan="4">Description</th></tr>
<tr><td>Daily</td><td colspan="4">The monthly amount divided by 30; system generated</td></tr>
<tr><td>BrDaily</td><td colspan="4">The daily amount divided by the total number of bedrooms in the housing unit; system generated and used to identify bedroom costs in unaccompanied units</td></tr>
<tr><td>Utilities Included</td><td colspan="4">Indicates that utilities are included in the rent amount; if this is clicked, there should be no amount entered into Utilities</td></tr>
<tr><td>Rent</td><td colspan="4">The monthly rent amount (minus the utilities amount)</td></tr>
<tr><td>Utility</td><td colspan="4">The monthly utility amount</td></tr>
<tr><td>Month</td><td colspan="4">Monthly rent amount plus the monthly utility amount; system generated</td></tr>
<tr><td>Year</td><td colspan="4">The month amount multiplied by twelve; system generated</td></tr>
<tr><td>Last Mod</td><td colspan="4">System generated date indicating when the record was last changed</td></tr>
<tr><td>Type</td><td colspan="4">Code used to define the use of housing; clicking the arrow will provide the following options: F (Family) – either leased or government owned, U (Unaccompanied) – either leased or government owned</td></tr>
<tr><td rowspan="8">Style</td><td colspan="4">Style of the housing unit; the housing unit screen displays the actual wording of the style; all reports use the codes</td></tr>
<tr><td>Code</td><td>Style of House</td><td>Code</td><td>Style of House</td></tr>
<tr><td>AA</td><td>Apartment</td><td>TD</td><td>Detached, two-story house</td></tr>
<tr><td>SA</td><td>Single-story townhouse</td><td>TA</td><td>Two-story townhouse</td></tr>
<tr><td>SD</td><td>Detached, one-story house</td><td>ZD</td><td>Detached, three-story house</td></tr>
<tr><td>SS</td><td>Single-story duplex</td><td rowspan="2">ZA</td><td rowspan="2">Three-story townhouse</td></tr>
<tr><td>TS</td><td>Two-story duplex</td></tr>
<tr><td rowspan="5">Start Date</td><td colspan="4">Date field to indicate the following:</td></tr>
<tr><td>HU Class</td><td colspan="3">Date Description</td></tr>
<tr><td>Leased</td><td colspan="3">Date the lease will begin; use YYYY/MM/DD format (for example, 2001/12/27)</td></tr>
<tr><td>Owned</td><td colspan="3">Date of initial occupancy of owned house</td></tr>
<tr><td>ISSA</td><td colspan="3">Effective date as agreed to in ISSA and on form DD 1144, Support Agreement</td></tr>
</table>

Field	Description
Stop Date	Date the lease is terminated, an ISSA is expiring, or an owned housing unit is removed from the inventory ***NOTE:*** *Stop Date for a Leased House is entered by the system based on a previously created termination modification. Users do not enter Stop Dates for leases.*
Pre Cancel	The predicted date that a lease will cancel; this date is automatically entered when a termination modification is completed; users do not enter this date
Resc Date	The date a previously signed cancellation is rescinded and lease continued
Converted	Indicates the date that a housing unit was converted from either a Family unit to an Unaccompanied unit, or vice versa

Table B-2 Housing Unit Fields for Owned Housing Only

Field	Description
Diverted	Check-box entered by LHO/AHO; used to REQUEST diversion of an owned housing unit; is accompanied by documentation
Divert Date	Date Diversion is approved; entered by COMMANDANT (G-WPM-4) after receiving documentation requesting diversion and if approved; if approved, Stop Date and Diverted Date are entered and the housing unit is removed from the inventory
Divert Rmrks	Remarks entered by LHO/AHO/HQ regarding the diversion of the housing unit; cannot be overwritten once G-WPM-4 approves diversion
Inadq Dt	Date housing unit is declared inadequate; entered by AHO based on Commandant approval
Rehab Dt	Date of the last Major Rehab (defined as causing the housing unit to be inhabitable)
Env Asses	Date of last Environmental Assessment; entered by AHO

Table B-3 Lessor Tab Fields

Field	Description
Lessor Name(s)	The name of the primary lessor of the housing unit is entered on line 1; the name of the secondary lessor of the housing is entered on line 2
Tax Code	The Tax code or Social Security Number for the primary lessor ***NOTE:*** *Only one tax code may be entered.*
Owner Name(s)	The name of the primary owner of the housing unit is entered on line 1; the name of the secondary owner of the housing is entered on line 2 ***NOTE:*** *Entered only if the Lessor is the Agent for the Owner.*
Lessor Is Agent*	Indicates the Lessor is an Agent for the Owner of the property
Lessor is Owner*	Indicates the Lessor is the Owner of the property
****NOTE:*** *One of the two options above must be checked. A lessor is either an owner or an agent.*	
Owner a Federal Employee?	Checked if the owner is a Federal Employee
Deed Attached to Contract?**	Indicates the deed of ownership is attached to contract
Deed on File at Area Auth?**	Indicates the deed of ownership is on file with the Contracting Officer at the AHO
*****NOTE:*** *One of the two above options must be checked. The deed must be either at the AHO office or attached to the contract.*	
Power of Attorney/ Mgmt***	Indicates the Power of Attorney/Management Agreement is attached to the contract
Power of Attorney/Mgmt Agree on file (AHO)?***	Indicates the Power of Attorney/Management Agreement is on file with the Contracting Officer at the AHO
******NOTE:*** *If the lessor is an Agent, one of the two above options must be checked. There must be a Power of Attorney/Mgt Agreement on file.*	
Correspondence Address	The four-line correspondence address of the lessor; do not repeat the lessor's name
Check Mailing Address	The four-line address to which payment checks should be sent to the lessor, if not direct deposit; defaults to direct deposit

Field	Description
Phone No.	The phone number for Point of Contact (POC) of the Lease
Emergency	The emergency phone number for POC of the Lease
Contact	The POC for the lease; the person you would contact on a day to day basis to discuss lease

Table B-4 Amenity Tab Fields

Field	Description
Heat	Describes the type of Heat Source in the housing unit; clicking on the list box provides the following options: Electric, Oil, Coal, Propane, Natural Gas, Other, None
Garage	Describes the type, if any, garage attached to the unit; clicking on the list box provides the following options: None, Attached, Detached, Carport
Flooring	Describes the primary type of flooring in the unit; clicking the list box provides the following options: Tile, Carpet, Vinyl, Hardwood, Linoleum, Other
Flooring2	Describes the second type of flooring in the unit if different from Flooring; clicking the list box provides the same options as Flooring
Assgnd Parking	Describes how many, if any, parking slots are assigned to the housing unit; clicking the list box provides the following options: 1, 2, 3, 4
The following amenities have an impact on the lease contract:	
Smoke Detector	Must be checked if a lease
Fire Sprinkler	Checking fire sprinkler includes it on the lease; otherwise lease contract indicates it is not applicable
Monthly Pest Control	If checked, adds a paragraph to the lease indicating the lessor is responsible for monthly pest control
Occupant Responsible for Grounds Care	If checked, lease indicates the occupant is responsible for grounds care; otherwise, lease indicates lessor is responsible
Child Care Permitted	If checked, lease indicates the lessor will allow child care
Pets Allowed	If checked, lease indicates pets are allowed; corresponding text box with pet restrictions will also be placed on the lease

Table B-5 ISSA Fields

Field	Description	
HU#	Number always starts with I (for example, IS01xxx) 2nd number reflects ISSA number within an AHA AOR. If no more than one ISSA has been negotiated, then the number will always be 1; if more than one has been negotiated, this number will increment by one. 3rd and 4th digits reflect AHA number 4th through 7th reflect numerically assigned number for a unique ISSA number For example, for an AOR that has negotiated 2 ISSAs, the numbers would be: • I101001, I101002, I101003 - first ISSA with 3 houses • I201001, I201002, I201003 – second ISSA with 3 houses	
Opt Year	The Option Year that the ISSA expires as negotiated	
Start Date	Effective date as agreed to in ISSA and on form DD 1144, Support Agreement	
Stop Date	Left blank until the ISSA expires and the unit is vacated	
Rent & Util	If	Then Enter
	Flat rate	The agreed upon rate (monthly rate)
	Dependent on paygrade	Leave blank until occupied, then enter amount agreed upon
Zip	The Zip code for the housing unit location	
Class	Describes the class of housing; clicking on the arrow provides these three choices: Leased (L), Government Owned (G), or ISSA (I)	
County	The county where the housing unit is located	
Type	Code used to define the use of housing; clicking the arrow will provide the following options: F (Family) – either leased or government owned, U (Unaccompanied) – either leased or government owned	
Address	2 lines - the first and second (if applicable) line of the housing unit street address; as a rule, enter all of the address in the first line	
City	The City where the housing unit is located	
State	The State abbreviation for the housing unit location	

Field	Description
Congressional District	The two-digit field for the Congressional District of the city where the housing unit is located (for example, 02, 05, 12)
Bedrooms	The total number of bedrooms in the housing unit
Baths	The total number of bathrooms in the housing unit (for example, 1, 1.5, 2, 2.5)
Total Rooms	The total number of rooms in the housing unit minus bathrooms
Square Feet	The square footage of housing unit's living area

Table B-6 ISSA Fields on the Lessor & Amenities Tab

Field	Description
Lessor Name	Specific Non-USCG Agency (for example, Naval Submarine Base New London); use both lines if needed
Owner	Contents of Block 1, DD 1144, Agreement Number
Corresp. Address	Complete address to correspond with agency, as specified in DD 1144, Block 5a
Payment	Leave blank if same as correspondence address, otherwise enter payment processing address
Lessor POC	Agency POC
Phone	Phone number for POC

Enter only the fields required by HMIS

APPENDIX C

PERSONNEL AND APPLICANT FIELDS

Table C-1 Personnel Screen Fields

If you are viewing a Coast Guard Active Duty member, you may NOT modify these fields. The fields may only be modified for non-Coast Guard personnel.

Field	Description
SSN	Social Security Number
Last Name	Last name of the person
First Name	First name of the person
MI	Middle Initial
Suffix	Additional name information (such as Jr, Sr, or III)
Sex	Gender; male or female
DOB	Member's date of birth
Marital Status	Marital status of the member
Spouse in Service	Checked if spouse in service
# of Dependents	Number of dependents
Rank	Member's rank
Pay Grade	Member's pay grade
BAH Code	Code used to describe BAH status
Amount	Amount of BAH entitled to ***NOTE:*** *This value is not downloaded.*
Unit	USCG Unit assigned to; if non-USCG, enter unit of the LHA managing the housing units
Report Date	Date reported to Unit
Rotation Date	Date anticipated to rotate
Rotation Reason	Reason for rotation
Service Code	Service Code; users may not select USCG
Extend Date	Date an extension was approved to remain at current duty station

Table C-2 Application/Waiting List Fields

Field	Description
WL Priority	Indicates the priority (if any) that the member has on the waiting list: • Flag & Command Quarters • Key & essential personnel • Deploying Personnel • Special Needs • Normal • Other Services
WL Class	Indicates the class of housing the member is on a waiting list for; is selected by clicking on the down arrow and selecting either: • Owned • Leased • Both Owned and Leased
WL Type	Indicates the type of housing the applicant qualifies for; is selected by clicking on the down arrow and selecting either: • Family • Unaccompanied
WL Qtrs Designation	Same as Housing Qtrs Designation, an entry is selected here if the applicant will be occupying Owned Designated Quarters
WL OPFAC	OPFAC of the LHA who maintains the waiting list and manages the housing units
Need Date	Date housing is needed as it appears on the Housing Application
Control Date	Date of receipt of the Housing Application, or, if member has not arrived yet, a date that is no more than 35 days prior to anticipated arrival date

Field	Description
Exemption	Indicates if applicant, although not qualified for housing, has been granted an exemption; selections are made as follows: • Individual if the applicant has been granted an exemption waiving eligibility requirements for leased housing • Blanket if the applicant is among a specific pay grade that has been granted a blanket waiver for eligibility requirements for leased housing
Expiration Date	If an exemption was selected, enter the date the exemption expires
Conv Move	Indicates that this application is for a convenience rather than PCS Move; click the down arrow and select the reason for the convenience move
Special Needs	Clicked only if special needs requires special housing needs, otherwise leave blank; text box provides space for explanation; only items related to housing should be entered here (examples of housing related special needs are wheelchair access and ground level only)
On Hold	Clicked to indicate that a member has been placed On Hold on the waiting list rather than being removed
Remove Code	Code to describe why a person is removed from a waiting list
Remove Remarks	Remarks section to explain why a person is removed from the waiting list
Sched In Date	Date housing officer anticipates a house will be available for member
Sched Out Date	Date member anticipates he/she will move out
Est Arrival Date	Date Member anticipates he/she will arrive at new duty station
Sched In Address	Address of anticipated housing unit ***NOTE:*** *This value may or may not be the actual housing unit assigned.*
Keys Issued	Number and type of keys provided to occupant
New Duty Station	Duty station where the member will be reporting to
New Duty Station Phone Number	Phone number of new unit
Home Phone	Member's home phone number
Work Phone	Member's work phone number
DOD File Date	Date member applied for housing with DOD

Field	Description
On Promotion List	Indicates the applicant is on list for promotion
Civilian Hsg Waiver	If the applicant is a civilian, indicates a waiver has been approved
Spouse Resides with Member	From PDS
Spouse Pregnant	Click if appropriate and enter anticipated delivery date
Smoker	Used for Barracks only
Pets	Click if applicant has pets
Pets/Description	Enter descriptions of pets
Weapons/ Descriptions	Check if applicable and enter the descriptions of weapons

APPENDIX D

CLAIM FIELDS

Table D-1 Claim Information Fields

Field	Description	
Claim Date	HU Class	Date Description
	Owned	Date it was discovered that there was a damage claim against the member
	Leased	Date on the letter from the lessor indicated they were submitting a damage claim
Received Date	HU Class	Date Description
	Owned	Date a claim was discovered
	Leased	Date on the letter from the lessor
Claim Amount	HU Class	Date Description
	Owned	Amount determined by the LHO that would be required to repair damages
	Leased	Amount requested by the lessor
Reason for Claim	Typical reasons why damages occur; click the list box and select the appropriate reason	
Claim Remarks	Remarks pertaining to the damage claim	
Settlement Date	Date that all payment issues have been settled (in other words, lessor has been paid for leased housing); date all paperwork has been submitted for payment	
Settlement Amount	HU Class	Date Description
	Owned	Amount determined appropriate for payment by the member for damages
	Leased	Amount determined appropriate for payment to the lessor as provided in the LHCO's final decision
Settlement Days	System generated amount of processing dates from the date received to the settlement date	
SF30 to FINCEN	Date that all payment processing paperwork is submitted to the FINCEN	
Damage Remarks	Remarks pertaining to the damage claim	
Reopen Date	Date the claim is reopened (after being closed)	
Approval Date	Date the claim was determined to be a valid claim; critical field – must be approved to count on reports (AHO staff approve Leased & ISSA Housing Claims, LHO or AHO staffs approve Owned Housing Claims)	

Table D-2 Claim Member Fields

Field	Description
Liability Amount	Amount that the member is liable to pay for damages
Demand Date	Date of the letter sent to the member stating the amount of the damages and the members obligation to pay
Payment Type	Method of payment for the member
Payment Status	Status of the member's payment
Member Settlement Date	Date that all payment paperwork has been submitted and the member has either paid or is paying by allotment
Member Settle Amount	Final amount that the member pays the government

APPENDIX E

BARRACKS MANAGEMENT AND RELATED FIELDS

Table E-1 Barracks Management Fields

Fields	Description
LHA OPFAC	OPFAC of the responsible LHA; selected by clicking down on the arrow
Barracks Name	Name of the Barracks facility, including city and state (for example, Broome Hall, San Diego, CA)
Address 1	1st line of address
Address 2	2nd line of address (if applicable)
City	City where Barracks are located
Year Built	Date the Barracks were built
UPH OPFAC	OPFAC where the UPH is located
Total Rooms for Housing	Not entered by user; system generated as rooms are created
Total Rooms Constructed	Entered by user; number of barracks rooms as originally constructed

Table E-2 Room Information Fields

Field	Description
Total Beds	Number of beds contained in the room
Room Number	Room number as assigned by the UPH Manager
Type of Room	Description of the use of the room; selected by clicking down on the arrow
Designation	Indicates if the room is Permanent Party or Transient; selected by clicking down on the arrow
Year Built	Year that the room was built; may be different from the year the Barracks were built
Sq Feet	Size of the room
Sex	Indicates if a male or female room
Bath	Drop-down selection to chose from the following options: • Community – bath shared by multiple occupants • Private – 1 bath per room • Shared – 1 bath to 2 rooms

Table E-3 Barracks Application/Waiting List Fields

NOTE: *Only those fields pertaining to Barracks are described below. To get a complete description of the rest of the fields, refer to the Housing Section of this manual.*

Field	Description
WL Class	Indicates the class of housing the member is on a waiting list for; selected by clicking the down arrow and selecting **r**
WL Type	Indicates the type of housing the applicant qualifies for; selected by clicking the down arrow and selecting **Barracks**
WL OPFAC	OPFAC of the LHA who maintains the waiting list and manages the housing units
Need Date	Date housing is needed as it appears on the Housing Application
Control Date	Date of receipt of the Housing Application or, if member has not arrived yet, a date that is no more than 35 days prior to anticipated arrival date
Sched In Date	Date UPH manager anticipates a room will be available for member
Sched Out Date	Date member anticipates he will move out
Est Arrival Date	Date member anticipates he will arrive at new duty station
Sched In Address	Address of anticipated room ***NOTE:*** *This may or may not be the actual housing unit assigned.*
Keys Issued	Number and type of keys provided to occupant
New Duty Station	Duty station where the member will be reporting to
New Duty Station Phone Number	Phone number of new unit
Home Phone	Members home phone number
Work Phone	Member's work phone number
On Promotion List	Indicates the applicant is on list for promotion
Smoker	Used for Barracks only
Pets	Click if applicant has pets
Pets/Description	Enter descriptions of pets
Weapons/ Descriptions	Check the box if applicable and enter the descriptions of weapons

APPENDIX F

ADHOC REPORTS

The Adhoc reporting utility provides the flexibility of creating any report that you want, printing the report, and extracting to Excel, including creating labels. It is a SQL query based behind the scenes with a user-friendly point and click, drop-down interface.

The following topics are included in this Appendix:

- SQL Statements
- Adhoc Screen Functions
- Creating Reports
- Converting an HMIS Adhoc Report to Excel
- Changing Lease Number to the FINCEN Format
- Creating Labels from an HMIS Adhoc Report.

SQL Statements

The following provides an explanation of the SQL statements seen on the Adhoc Screen:

Table F-1 SQL Statement Functions

SQL Statement	Function
Select	Used to identify the field names you want to be displayed on report
From	Specifies the tables or queries that contain the fields listed in the Select statement
Where	Specifies criteria of the records that you want to be displayed. Filters on individual records.
Group By	Combines records with identical values in the specified field list into a single record; a summary value is created for each record if you include an SQL aggregate function, such as Sum or Count, in the Select statement
Having	Optional; HAVING is similar to WHERE; after records are grouped with Group By, Having determines which records are displayed. Filters on group records.
Order By	Sorts a query's resulting records on a specified field or fields in ascending or descending order

Adhoc Screen Functions

Functions are provided at the bottom of the ADHOC screen to allow you to open a saved report, save a report, clear an existing report, run a report, and look at the query in plain English.

The following provides explanation and instructions for each option:

Table F-2 Adhoc Screen Functions

Option	Explanation and Instruction for Use
Cancel	Click **Cancel** to cancel any action you have started and to exit from Adhoc.
Save	Click **Save** to save your Adhoc Report to a floppy or U drive. Use the following instructions: 1. Create an adhoc report. 2. Click **Save**. 3. Select the **U:** drive for the location to save the query. 4. Enter a name for the query. 5. Click **Save**. ***NOTE:*** *The query will be saved with a file extension of .sql (for example, Bah_Cd.sql).*
Open	Click **Open** to load an adhoc query that has been saved. Use the following instructions: 1. Click **Open**. 2. Select the **U:** drive for the location where the query is saved. 3. Select the query. 4. Click **Open**.
Run	Click **Run** to execute a query that has been created. Once the query has run and appears on the screen, use the following instructions to save the report results: 1. Click **Save Results**. 2. Select a location to save the report. 3. Enter a report name. 4. Click **Save**. 5. Enter a title for the report. 6. Click **OK**.

Option	Explanation and Instruction for Use
	NOTE: *The report saves as a Text file.*
Clear	Click **Clear** to clear the current report and start over.
Show Query	Click **Show Query** to show the query on screen in a SQL format.

Creating Reports

The following section provides instructions for creating one sample report.

When selecting Adhoc from the reports menu, the following screen appears:

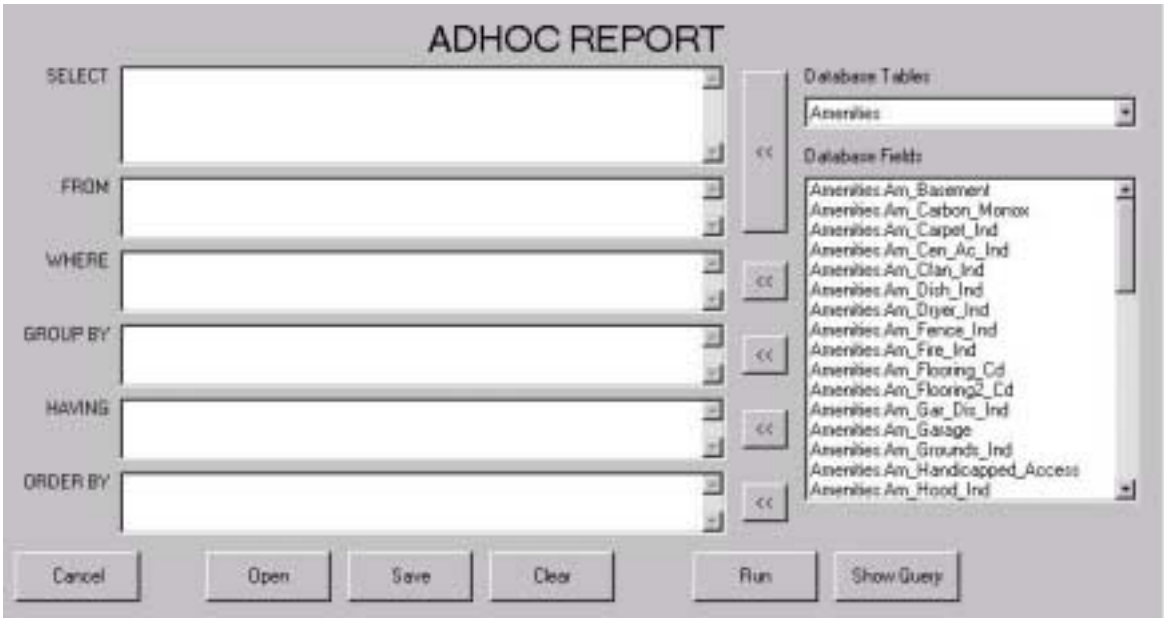


Figure F-1 Adhoc Report Screen

The sample report created in this section is a listing of occupants of Housing and their BAH code. Perform the following steps to create this report:

Step 1 Decide on what fields you want. In our sample, we want a report with the following fields:

- **Hu#**
- **Name**
- **House.Ls Rent**
- **House.Ls Utl Amt**
- **Address**
- **City**
- **Type of Housing**
- **Class of Housing**
- **BahCode**
- **Room #**
- **LHA**.

Step 2 Refer to *Appendix G, Table Definitions* to identify both the Table Name and the field name for the fields that you want on the report. In our sample report, there are multiple tables as shown in Table F-3:

Table F-3 Sample Report Tables and Field Names

Table	Field Name
Living Quarters	Room Number (Room_Num)
Person	Last Name (Nm_last) First name (nm_first) Bah Code (BAH_CD)
House	HU# (ls_num) Class of Hsg (Class_CD) House.Ls Rent House.Ls Utl Amt
Building	Address (Addr1) City (City) Type of Hsg (HU_Type_CD) AHA (AHA) LHA (LHA_ATU and LHA_OPFAC)

Step 3 Because we want the report formatted with fields in a certain order, we enter them in that order. Using the results of Step 2 as a reference, find the **HU#**.

NOTE: *The **HU#** is found in the House table and its field name is **ls_num**.*

Step 4 Using the list box in the DataBase table, select **House**.

A listing of fields appears.

Step 5 With the field **house.ls_num** highlighted, click the arrow beside the **SELECT** option.

Step 6 The next column of the report is **Name**. Again, using the results of Step 2 as a reference, find **Name**.

***NOTE: Name** is found in the Person table and its field name is **nm_last**.*

Step 7 Using the list box in the DataBase table, select **Person**.

A listing of fields appears

Step 8 With the field **Person.nm_last** highlighted, click the arrow beside the **SELECT** option.

Step 9 Continue selecting the fields and tables until all are moved into the select box.

The results appear similar to the following:

```
House.Ls_Num,Person.Nm_Last,Person.Nm_First House.Ls_Rent, House.Ls_Utl_Amt
Building.Addr1,Building.City,Building.Hu_Type_Cd,
House.Class_Cd,Person.BAH_Cd,Living_Quarters.Room_Num,
Building.AHA, Building.LHA_ATU,Building.LHA_OPFAC
FROM
(Living_Quarters),(Person),(Building),(House)
```

***NOTE:** The system automatically enters the table names.*

Step 10 To ensure the tables relate to each other properly, we must link the tables to each other with unique field names. In our sample, the following applies:

Table F-4 Sample Report Tables and Linking Fields

Table	Linking Field
Living Quarters	Building_ID Person_ID
Person	Person_ID
Building	Building_ID
House	Building_ID

The following links must be established in the WHERE section of the ADHOC report:

(WHERE)

Living_Quarters.Building_ID = Building.Building_ID

(to ensure we have the right building linked with the right living quarters)

Living_Quarters.Person_ID= Person.Person_ID

(to make sure we have the living quarters linked with the right person)

Living_Quarters.Building_ID = House.Building_ID

(to make sure we have the living quarters linked with the right house)

To complete these steps use the following instructions:

Step 11 Using the list box in the DataBase Table select **Living_Quarters**.

Step 12 Highlight the **Living_Quarters**.**building_id** field, and click the arrow beside the **WHERE** option.

Step 13 Place the cursor in the space at the end of **Living_Quarters.building_id**.

Step 14 Press the space bar, enter: **=** and press the space bar again

Step 15 Using the list box in the DataBase table, select **Building**.

Step 16 Highlight the **Building**.**building_id** field, and click the arrow beside the **WHERE** option.

Step 17 To add an additional join, place cursor in the space at the end of **Building.building_id,** press the space bar, enter: **AND** press space bar again, then press **ENTER**, and repeat Steps 11-15

Step 18 Continue creating all of the joins described in Step 10 above.

The results appear similar to the following:

```
House.Ls_Num,Person.Nm_Last,Person.Nm_First,
Building.Addr1,Building.City,Building.Hu_Type_Cd,
House.Class_Cd,Person.BAH_Cd,Living_Quarters.Room_Num,
Building.AHA, Building.LHA_ATU,Building.LHA_OPFAC
FROM
(Living_Quarters),(Person),(Building),(House)
WHERE
Living_Quarters.Building_ID = Building.Building_Id AND
Living_Quarters.Person_ID= Person.Person_ID and
Living_Quarters.Building_ID = House.Building_ID
```

Step 19 Adhoc queries will report data for the entire USCG, unless criteria are established to query only for a specific site. For our same query, three options are available – by MLC, by AHA, or by LHA. To add the site criteria, place the cursor in the space at the end of **House.building_id**, press the space bar, enter: **AND** press the space bar again, then press **ENTER**. Proceed according to the following table:

Table F-5 Sample Report Data Entry

If you want	Then	Enter
MLC criteria	Select the **MLC** from the building table. Move the field into the WHERE clause.	**=** (either) **"ATL"** or **"PAC"**

Step 20 To add a sort order, select the field that you want to sort by, and click the field into the **Order By** area.

Step 21 Save your query and then click the option to **RUN** as described in the Adhoc Options section. Your resulting report should appear similar the following sample.

NOTE: *The sample provided below is a simplified report.*

ATU	OPFAC	Site_Type	Site_ATU	Unit_Name	Site_OPFAC
07	66749	LHA		CGLO JROT	
05	66750	LHA		CG ANT CA	
07	66751	LHA	07	UG/FL INTE	71107
20	11407	LHA	07	CGC GALLA	36289
08	66748	LHA	08	UG/UNIV O	36240
07	66399	LHA		CGLO US E	
07	66745	LHA		UG/FL A&M	
76	65100	LHA	08	CG AVTRAI	33244
11	66738	LHA		CGLO FISC	
13	66731	LHA		USS RODN	
20	12103	LHA	07	CGC VIGILA	36237
33	66736	LHA		FDCC WES	
40	50100	LHA	32	CG ARSC E	47300
05	66735	LHA		NAS NORFI	
09	66730	LHA		UG/KENT S	
09	66734	LHA		UG/WAYNE	
09	66741	LHA		FED CORRI	
07	30324	LHA	07	CG STA YAI	20150

Figure F-2 Sample Adhoc Report

Converting an HMIS Adhoc Report to Excel

This section provides instructions for converting an adhoc report to Excel.

Step 1 Run your report according to instructions in the *Adhoc Screen Functions* section of this appendix.

Step 2 Save your report to a .txt file according to instructions in the *Adhoc Screen Functions* section of this appendix.

Step 3 Open Microsoft Word.

Step 4 Open the text file that you created in Step 2; make sure your Files of type field is set to **.txt**.

Step 5 If a prompt similar to that shown in Figure F-3 appears, select the **Plain Text** option button and click **OK**.

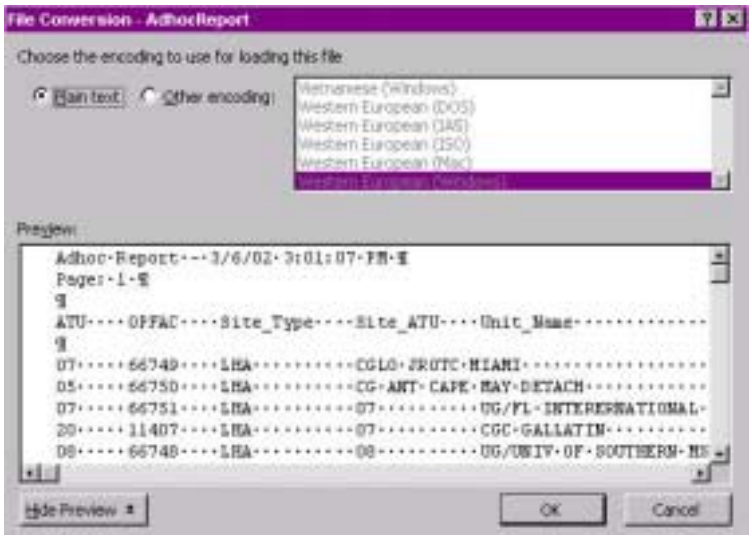


Figure F-3 File Conversion Dialog Box

Step 6 With your file open, delete the header information, as shown in Figure F-4 (the header should only be the first three lines).

NOTE: *Delete down to the column headings. The area to delete could include a line with spaces.*

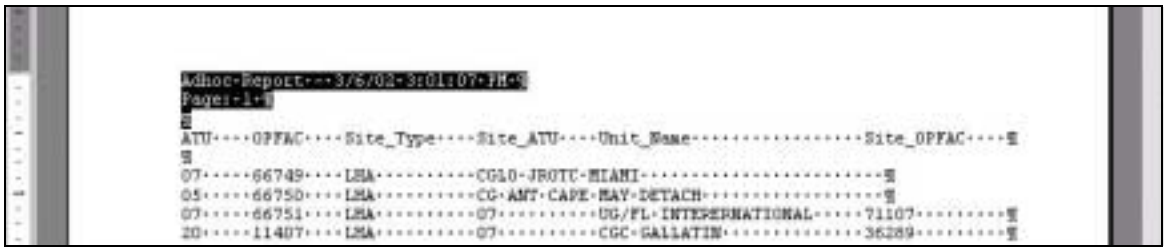


Figure F-4 Delete Header Information

Step 7 Save the document as a .txt file, and close Microsoft Word.

Step 8 Open the file in Microsoft Excel; make sure your Files of type field is set to **.txt**.

A Text Wizard appears, as illustrated in Figure F-5.

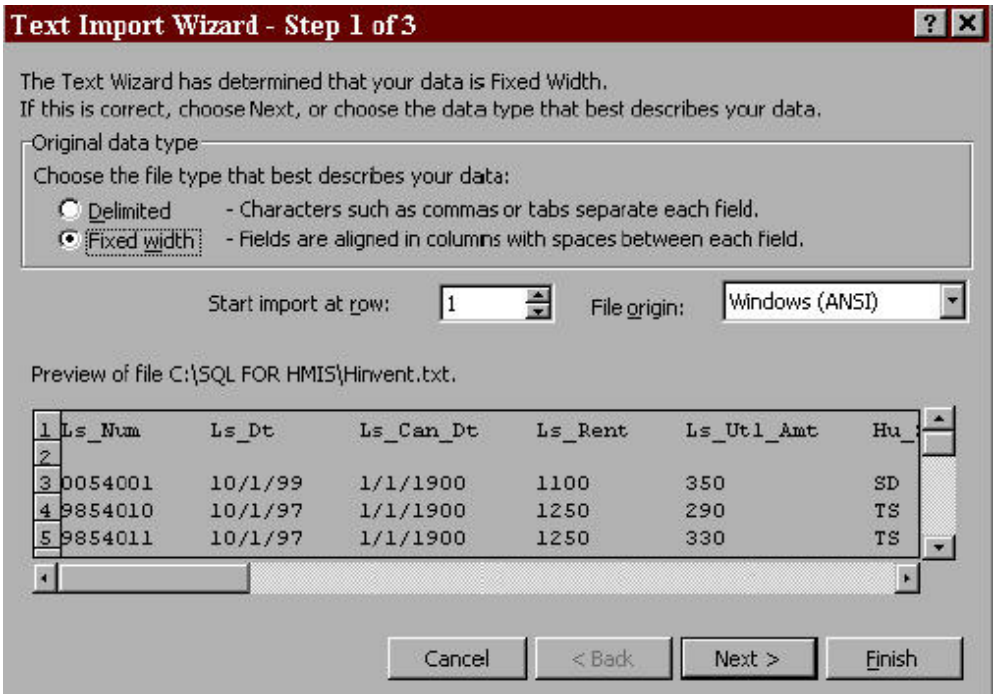


Figure F-5 Text Import Wizard – Step 1 of 3

Step 9 Click the **Fixed width** option button.

Step 10 Click **Next**.

A next page of the Text Wizard appears, as illustrated in Figure F-6.

Step 11 The lines mark where the columns begin; move the indicator over to get all of the fields (see Figure F-6).

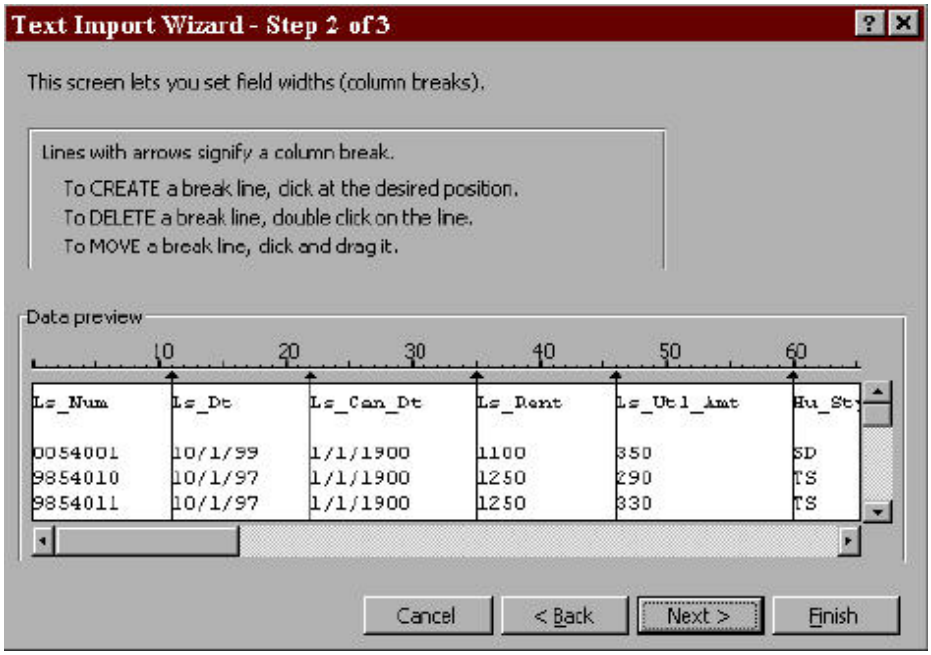


Figure F-6 Text Import Wizard – Step 2 of 3

Step 12 Click **Next**.

The next page of the Text Wizard appears, as illustrated in Figure F-7.

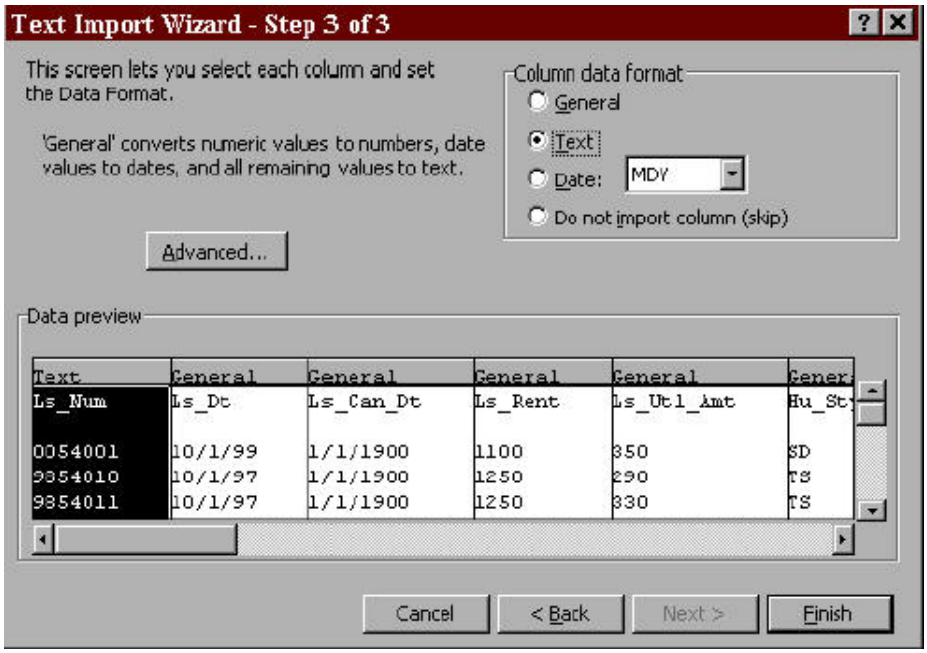
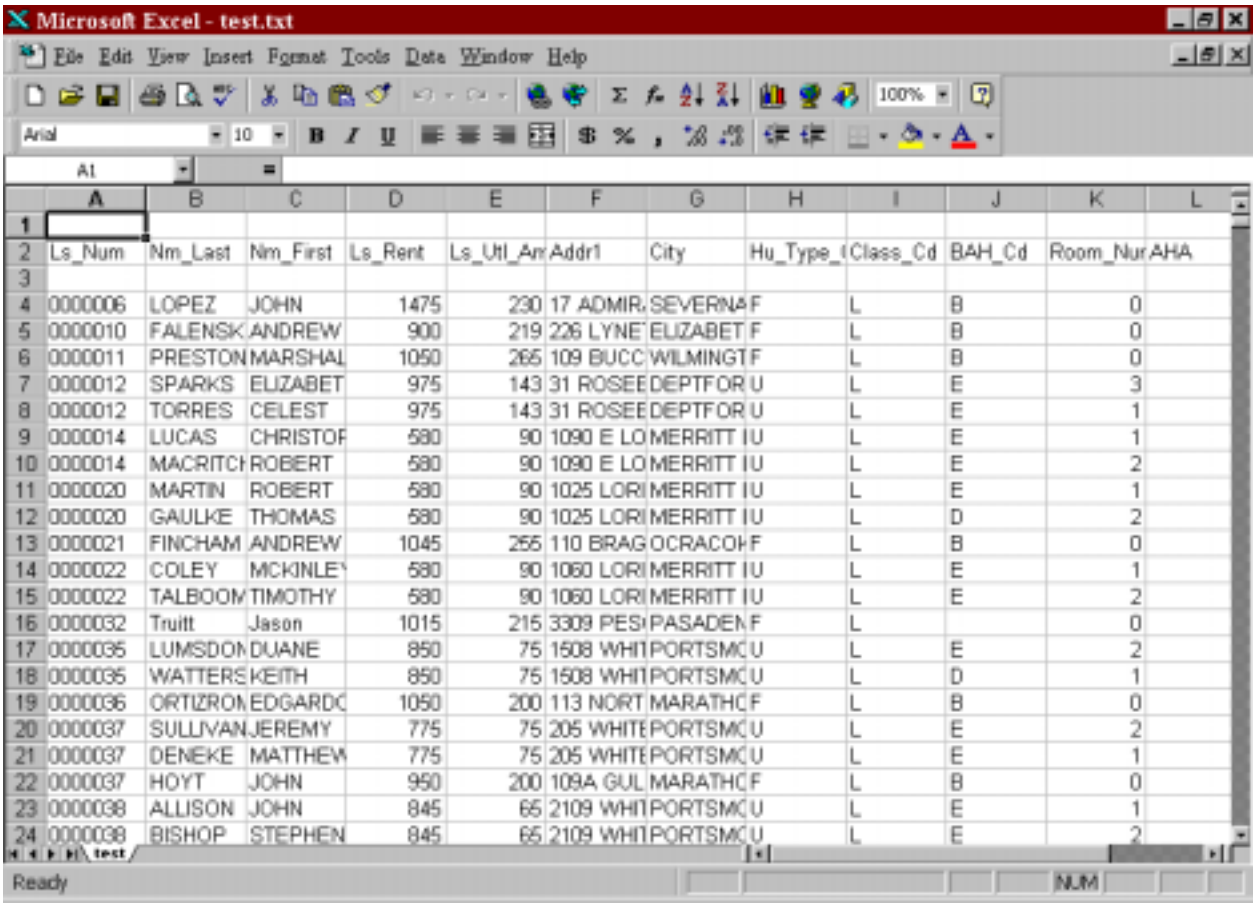


Figure F-7 Text Import Wizard – Step 3 of 3

Step 13 If HU# (lease number) was part of your original query, then perform the following steps:

1. Highlight **Ls_Num**.
2. Click the **Text** option button in the Column data format area.
3. Click **Finish**.

Your resulting files will look similar to the following:

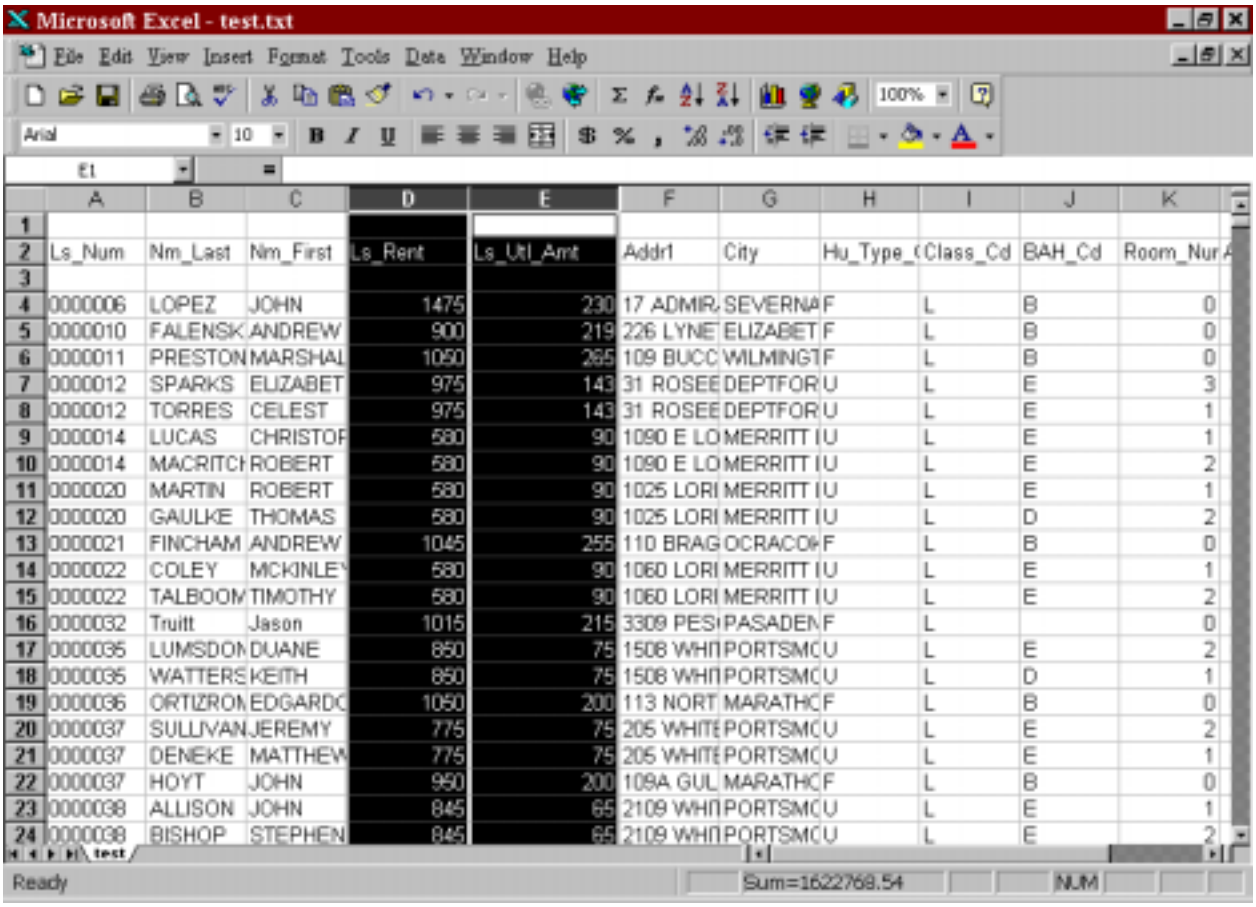


Ls_Num	Nm_Last	Nm_First	Ls_Rent	Ls_Utl_An	Addr1	City	Hu_Type_(	Class_Cd	BAH_Cd	Room_Nur	AHA
0000006	LOPEZ	JOHN	1475	230	17 ADMIR	SEVERNA	F	L	B	0	
0000010	FALENSK	ANDREW	900	219	226 LYNE	ELIZABET	F	L	B	0	
0000011	PRESTON	MARSHAL	1050	265	109 BUCC	WILMINGT	F	L	B	0	
0000012	SPARKS	ELIZABET	975	143	31 ROSEE	DEPTFOR	U	L	E	3	
0000012	TORRES	CELEST	975	143	31 ROSEE	DEPTFOR	U	L	E	1	
0000014	LUCAS	CHRISTOF	580	90	1090 E LO	MERRITT I	U	L	E	1	
0000014	MACRITCI	ROBERT	580	90	1090 E LO	MERRITT I	U	L	E	2	
0000020	MARTIN	ROBERT	580	90	1025 LORI	MERRITT I	U	L	E	1	
0000020	GAULKE	THOMAS	580	90	1025 LORI	MERRITT I	U	L	D	2	
0000021	FINCHAM	ANDREW	1045	255	110 BRAG	OCRACOH	F	L	B	0	
0000022	COLEY	MCKINLE	580	90	1060 LORI	MERRITT I	U	L	E	1	
0000022	TALBOOM	TIMOTHY	580	90	1060 LORI	MERRITT I	U	L	E	2	
0000032	Truitt	Jason	1015	215	3309 PES	PASADEN	F	L		0	
0000035	LUMSDON	DUANE	850	75	1508 WHI	PORTSMC	U	L	E	2	
0000035	WATTERS	KEITH	850	75	1508 WHI	PORTSMC	U	L	D	1	
0000036	ORTIZRON	EDGARDC	1050	200	113 NORT	MARATHC	F	L	B	0	
0000037	SULLIVAN	JEREMY	775	75	205 WHIT	PORTSMC	U	L	E	2	
0000037	DENEKE	MATTHEW	775	75	205 WHIT	PORTSMC	U	L	E	1	
0000037	HOYT	JOHN	950	200	109A GUL	MARATHC	F	L	B	0	
0000038	ALLISON	JOHN	845	65	2109 WHI	PORTSMC	U	L	E	1	
0000038	BISHOP	STEPHEN	845	65	2109 WHI	PORTSMC	U	L	E	2	

Figure F-8 Sample Excel File

The next steps will properly format the rest of the fields

Step 14 For Money fields, click on the columns as illustrated in Figure F-9 (ls_rent and Ls_util_amt).



	A	B	C	D	E	F	G	H	I	J	K
1											
2	Ls_Num	Nm_Last	Nm_First	Ls_Rent	Ls_Utl_Amt	Addr1	City	Hu_Type_(	Class_Cd	BAH_Cd	Room_Nur
3											
4	0000006	LOPEZ	JOHN	1475	230	17 ADMIR	SEVERNA	F	L	B	0
5	0000010	FALENSK	ANDREW	900	219	226 LYNE	ELIZABET	F	L	B	0
6	0000011	PRESTON	MARSHAL	1050	265	109 BUCC	WILMINGT	F	L	B	0
7	0000012	SPARKS	ELIZABET	975	143	31 ROSEE	DEPTFOR	U	L	E	3
8	0000012	TORRES	CELEST	975	143	31 ROSEE	DEPTFOR	U	L	E	1
9	0000014	LUCAS	CHRISTOF	580	90	1090 E LO	MERRITT I	U	L	E	1
10	0000014	MACRITCI	ROBERT	580	90	1090 E LO	MERRITT I	U	L	E	2
11	0000020	MARTIN	ROBERT	580	90	1025 LORI	MERRITT I	U	L	E	1
12	0000020	GAULKE	THOMAS	580	90	1025 LORI	MERRITT I	U	L	D	2
13	0000021	FINCHAM	ANDREW	1045	255	110 BRAG	OCRACO	F	L	B	0
14	0000022	COLEY	MCKINLE	580	90	1060 LORI	MERRITT I	U	L	E	1
15	0000022	TALBOOM	TIMOTHY	580	90	1060 LORI	MERRITT I	U	L	E	2
16	0000032	Truitt	Jason	1015	215	3309 PES	PASADEN	F	L		0
17	0000035	LUMSDON	DUANE	850	75	1508 WHI	PORTSMC	U	L	E	2
18	0000035	WATTERS	KEITH	850	75	1508 WHI	PORTSMC	U	L	D	1
19	0000036	ORTIZRON	EDGARDC	1050	200	113 NORT	MARATHC	F	L	B	0
20	0000037	SULLIVAN	JEREMY	775	75	205 WHIT	PORTSMC	U	L	E	2
21	0000037	DENEKE	MATTHEW	775	75	205 WHIT	PORTSMC	U	L	E	1
22	0000037	HOYT	JOHN	950	200	109A GUL	MARATHC	F	L	B	0
23	0000038	ALLISON	JOHN	845	65	2109 WHI	PORTSMC	U	L	E	1
24	0000038	BISHOP	STEPHEN	845	65	2109 WHI	PORTSMC	U	L	E	2

Figure F-9 Click the Columns

Step 15 Click **Format** from the toolbar, and then click **Cells**.

The Format Cells dialog box appears, as shown in Figure F-10.

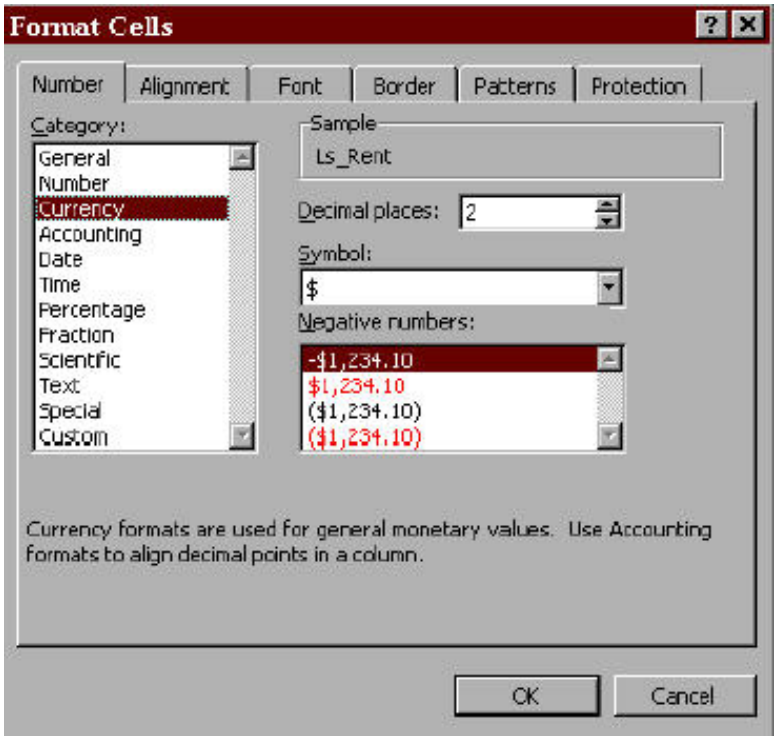


Figure F-10 Format Cells Dialog Box

Step 16 Select **Currency** from the Category column.

Step 17 Set Decimal places to **2**.

Step 18 Set Symbol to **$**.

Step 19 Click **OK**.

NOTE: *HMIS Adhoc creates headers and page numbers for all reports. The following steps will remove the headers and page numbers.*

Step 20 Select the left uppermost cell of the spreadsheet to highlight the entire spreadsheet.

Step 21 Click **Data** from the toolbar, and then click **Sort**.

The Sort dialog box appears as illustrated in Figure F-11.

Figure F-11 Sort Dialog Box

Step 22 In the My list has section, click the **Header row** option button.

Step 23 Select **Ls_Num** from the Sort by list box.

Step 24 Click the **Descending** option button.

Step 25 Click **OK**.

You will see all of the header information that HMIS created with the ADHOC report. This must be deleted.

Step 26 Highlight those rows that need to be deleted.

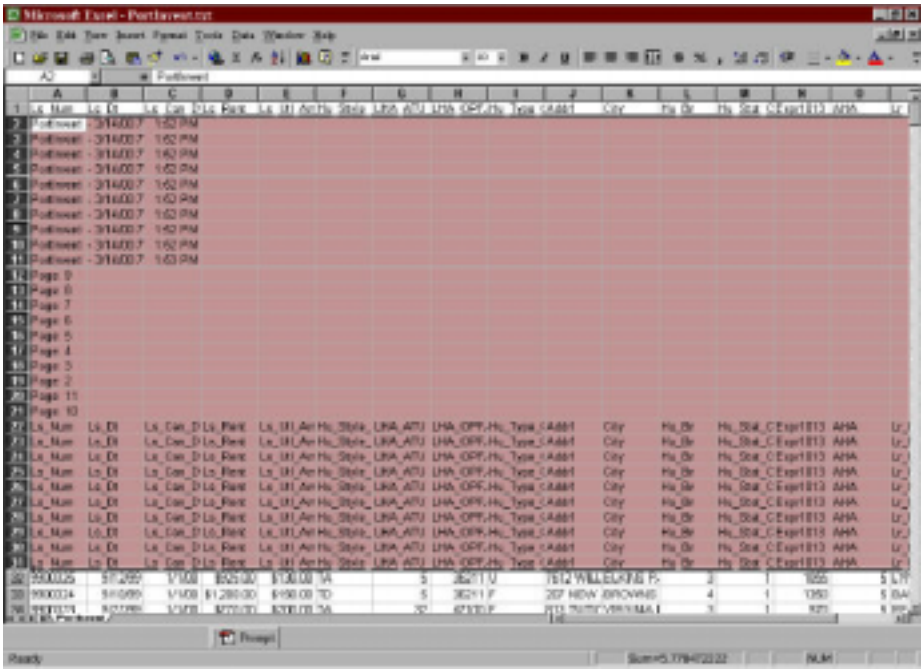


Figure F-12 Row Deletion

Step 27 Click **Edit** from the toolbar, and then click **Delete**.

All of the header information is removed.

Step 28 Click **File** from the toolbar, and then click **Save As**.

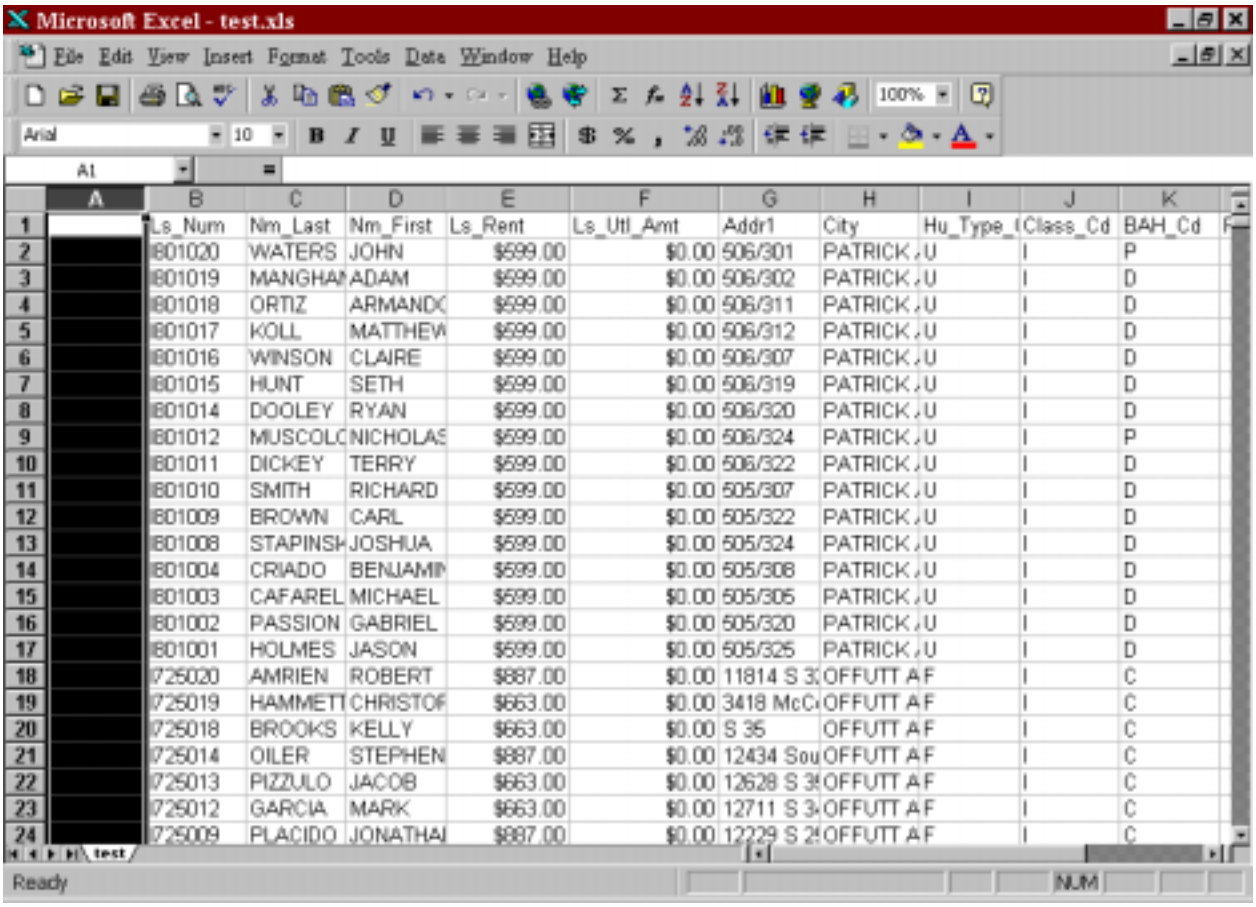
Step 29 Make sure your file type is an Excel Work Sheet. Enter a name for your file, and click **Save**.

Changing Lease Number to the FINCEN Format

This section provides instructions for changing the HU# to the FINCEN-formatted Document Number. This procedure requires your report to have been already converted to Excel.

Step 1 Open your report in Microsoft Excel.

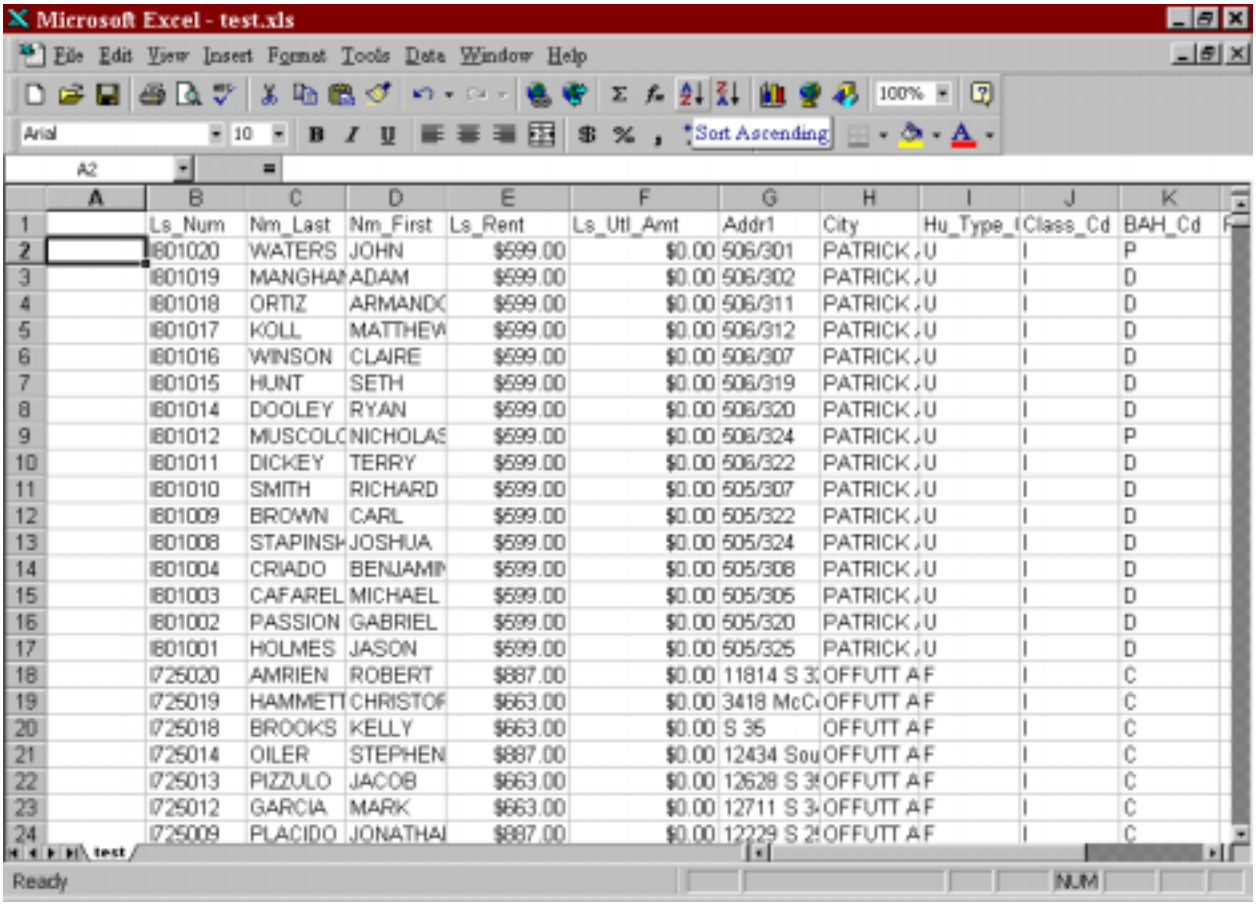
Step 2 Insert a column to the left of the Lease Number column (see Figure F-13).



	A	B	C	D	E	F	G	H	I	J	K
1		Ls_Num	Nm_Last	Nm_First	Ls_Rent	Ls_Utl_Amt	Addr1	City	Hu_Type_(	Class_Cd	BAH_Cd
2		801020	WATERS	JOHN	$599.00	$0.00	506/301	PATRICK	U	I	P
3		801019	MANGHAI	ADAM	$599.00	$0.00	506/302	PATRICK	U	I	D
4		801018	ORTIZ	ARMANDC	$599.00	$0.00	506/311	PATRICK	U	I	D
5		801017	KOLL	MATTHEW	$599.00	$0.00	506/312	PATRICK	U	I	D
6		801016	WINSON	CLAIRE	$599.00	$0.00	506/307	PATRICK	U	I	D
7		801015	HUNT	SETH	$599.00	$0.00	506/319	PATRICK	U	I	D
8		801014	DOOLEY	RYAN	$599.00	$0.00	506/320	PATRICK	U	I	D
9		801012	MUSCOLC	NICHOLAS	$599.00	$0.00	506/324	PATRICK	U	I	P
10		801011	DICKEY	TERRY	$599.00	$0.00	506/322	PATRICK	U	I	D
11		801010	SMITH	RICHARD	$599.00	$0.00	505/307	PATRICK	U	I	D
12		801009	BROWN	CARL	$599.00	$0.00	505/322	PATRICK	U	I	D
13		801008	STAPINSK	JOSHUA	$599.00	$0.00	505/324	PATRICK	U	I	D
14		801004	CRIADO	BENJAMIN	$599.00	$0.00	505/308	PATRICK	U	I	D
15		801003	CAFAREL	MICHAEL	$599.00	$0.00	505/305	PATRICK	U	I	D
16		801002	PASSION	GABRIEL	$599.00	$0.00	505/320	PATRICK	U	I	D
17		801001	HOLMES	JASON	$599.00	$0.00	505/325	PATRICK	U	I	D
18		725020	AMRIEN	ROBERT	$887.00	$0.00	11814 S 3	OFFUTT A	F	I	C
19		725019	HAMMETT	CHRISTOF	$663.00	$0.00	3418 McC	OFFUTT A	F	I	C
20		725018	BROOKS	KELLY	$663.00	$0.00	S 35	OFFUTT A	F	I	C
21		725014	OILER	STEPHEN	$887.00	$0.00	12434 Sou	OFFUTT A	F	I	C
22		725013	PIZZULO	JACOB	$663.00	$0.00	12628 S 3	OFFUTT A	F	I	C
23		725012	GARCIA	MARK	$663.00	$0.00	12711 S 3	OFFUTT A	F	I	C
24		725009	PLACIDO	JONATHAI	$887.00	$0.00	12229 S 2	OFFUTT A	F	I	C

Figure F-13 Column Insertion

Step 3 Click on the first cell in Column A that is opposite an entry for Ls_Num (see Figure F-14).



	A	B	C	D	E	F	G	H	I	J	K
1		Ls_Num	Nm_Last	Nm_First	Ls_Rent	Ls_Utl_Amt	Addr1	City	Hu_Type_(	Class_Cd	BAH_Cd
2		I801020	WATERS	JOHN	$599.00	$0.00	506/301	PATRICK	U	I	P
3		I801019	MANGHAI	ADAM	$599.00	$0.00	506/302	PATRICK	U	I	D
4		I801018	ORTIZ	ARMANDC	$599.00	$0.00	506/311	PATRICK	U	I	D
5		I801017	KOLL	MATTHEW	$599.00	$0.00	506/312	PATRICK	U	I	D
6		I801016	WINSON	CLAIRE	$599.00	$0.00	506/307	PATRICK	U	I	D
7		I801015	HUNT	SETH	$599.00	$0.00	506/319	PATRICK	U	I	D
8		I801014	DOOLEY	RYAN	$599.00	$0.00	506/320	PATRICK	U	I	D
9		I801012	MUSCOLC	NICHOLAS	$599.00	$0.00	506/324	PATRICK	U	I	P
10		I801011	DICKEY	TERRY	$599.00	$0.00	506/322	PATRICK	U	I	D
11		I801010	SMITH	RICHARD	$599.00	$0.00	505/307	PATRICK	U	I	D
12		I801009	BROWN	CARL	$599.00	$0.00	505/322	PATRICK	U	I	D
13		I801008	STAPINSK	JOSHUA	$599.00	$0.00	505/324	PATRICK	U	I	D
14		I801004	CRIADO	BENJAMIN	$599.00	$0.00	505/308	PATRICK	U	I	D
15		I801003	CAFAREL	MICHAEL	$599.00	$0.00	505/305	PATRICK	U	I	D
16		I801002	PASSION	GABRIEL	$599.00	$0.00	505/320	PATRICK	U	I	D
17		I801001	HOLMES	JASON	$599.00	$0.00	505/325	PATRICK	U	I	D
18		I725020	AMRIEN	ROBERT	$887.00	$0.00	11814 S 3	OFFUTT	AF	I	C
19		I725019	HAMMETT	CHRISTOF	$663.00	$0.00	3418 McC	OFFUTT	AF	I	C
20		I725018	BROOKS	KELLY	$663.00	$0.00	S 35	OFFUTT	AF	I	C
21		I725014	OILER	STEPHEN	$887.00	$0.00	12434 Sou	OFFUTT	AF	I	C
22		I725013	PIZZULO	JACOB	$663.00	$0.00	12628 S 3	OFFUTT	AF	I	C
23		I725012	GARCIA	MARK	$663.00	$0.00	12711 S 3	OFFUTT	AF	I	C
24		I725009	PLACIDO	JONATHAI	$887.00	$0.00	12229 S 2	OFFUTT	AF	I	C

Figure F-14 New Cell

Step 4 Click the function (***fx***) icon from the toolbar.

The Paste Function dialog box appears as shown in Figure F-15.

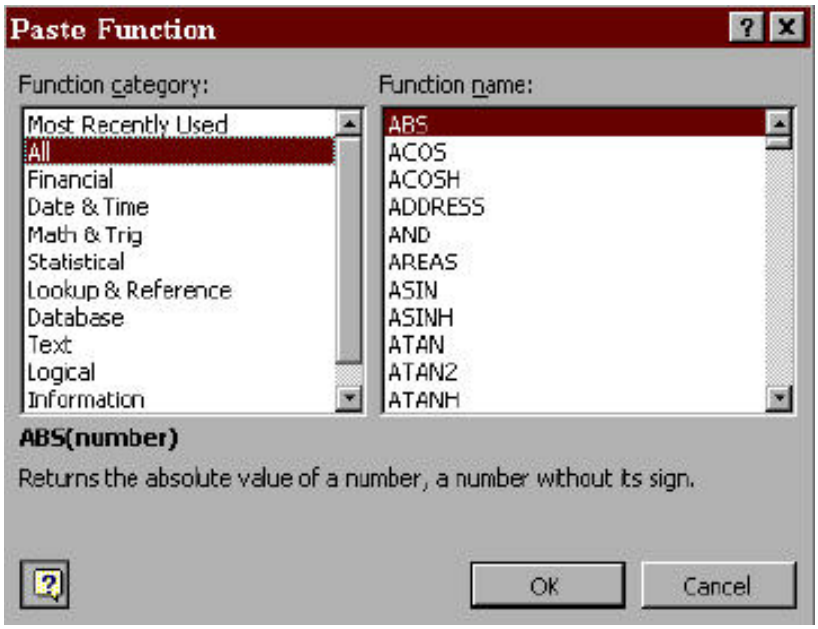


Figure F-15 Paste Function Dialog Box

Step 5 Select **All** from the Function category column.

Step 6 Select **ABS** from the Function name column.

Step 7 Click **OK**.

The ABS dialog box appears as shown in Figure F-16.

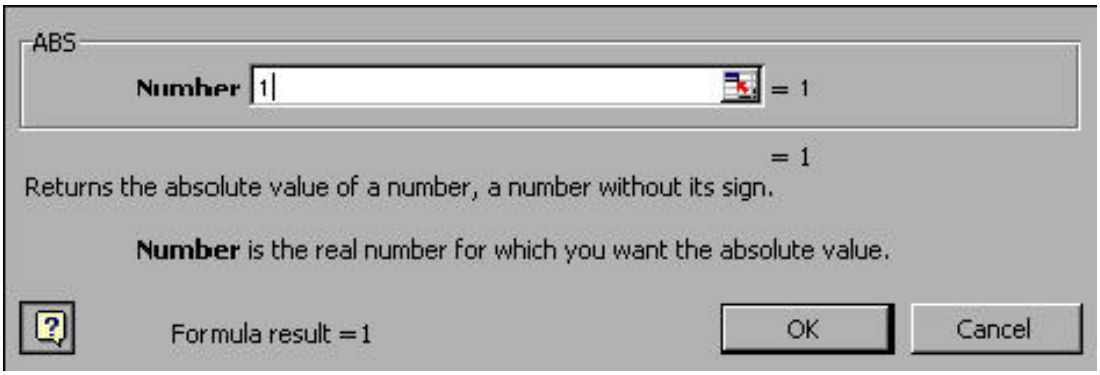


Figure F-16 ABS Dialog Box

Step 8 Enter: **1**

Step 9 Click **OK**.

Step 10 Ensure that the first cell in Column A that is opposite an entry for Ls_Num is active (see Figure F-14). Move the cursor to the formula bar, clear any values, and type the following exactly as below, changing only those items as noted:

="4000-*XX*-"$_\Delta$&LEFT(B2,2)$_\Delta$&"L-P*XX*"$_\Delta$&RIGHT(B2,3)

- Change the first **XX** to your Contract Site Number.
- Change the second **XX** to your Program Element Number.

Your spreadsheet appears similar to that shown in Figure F-17.

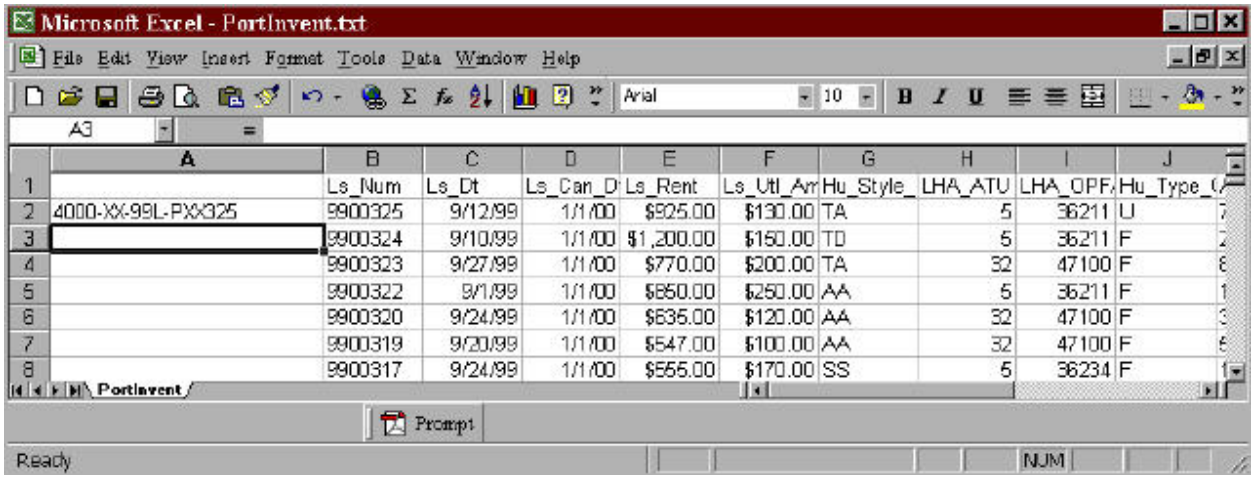
	A	B	C	D	E	F	G	H	I	J
1		Ls_Num	Ls_Dt	Ls_Can_D	Ls_Rent	Ls_Utl_Am	Hu_Style_	LHA_ATU	LHA_OPF	Hu_Type_
2	"L-PXX" &RIGHT(B2,3)	9900325	9/12/99	1/1/00	$925.00	$130.00	TA	5	36211	U
3		9900324	9/10/99	1/1/00	$1,200.00	$150.00	TD	5	36211	F
4		9900323	9/27/99	1/1/00	$770.00	$200.00	TA	32	47100	F
5		9900322	9/1/99	1/1/00	$850.00	$250.00	AA	5	36211	F
6		9900320	9/24/99	1/1/00	$635.00	$120.00	AA	32	47100	F
7		9900319	9/20/99	1/1/00	$547.00	$100.00	AA	32	47100	F
8		9900317	9/24/99	1/1/00	$555.00	$170.00	SS	5	36234	F

Figure F-17 Adjusted Spreadsheet

NOTE: *B2 in the formula in Figure F-17 refers to the lease number immediate to the right. The formula must be in the cell to the left of the lease number for this to work.*

Step 11 With all of your adjustments made (Program Element # and Contract Site #), press **ENTER**.

The resulting cell contains the lease number in the FINCEN format, as illustrated in Figure F-18.



	A	B	C	D	E	F	G	H	I	J
1		Ls_Num	Ls_Dt	Ls_Can_D	Ls_Rent	Ls_Utl_Am	Hu_Style_	LHA_ATU	LHA_OPF	Hu_Type_
2	4000-XX-99L-PXX325	9900325	9/12/99	1/1/00	$925.00	$130.00	TA	5	36211	U
3		9900324	9/10/99	1/1/00	$1,200.00	$150.00	TD	5	36211	F
4		9900323	9/27/99	1/1/00	$770.00	$200.00	TA	32	47100	F
5		9900322	9/1/99	1/1/00	$850.00	$250.00	AA	5	36211	F
6		9900320	9/24/99	1/1/00	$835.00	$120.00	AA	32	47100	F
7		9900319	9/20/99	1/1/00	$547.00	$100.00	AA	32	47100	F
8		9900317	9/24/99	1/1/00	$555.00	$170.00	SS	5	36234	F

Figure F-18 Lease Number in FINCEN Format

Step 12 Copy this formula for all of the rest of your lease numbers by clicking the cell containing the FINCEN formatted cell, drag the bottom right of the area, then let go.

Your first column will contain FINCEN numbers (see Figure F-19).

NOTE: *The Contract Site and Program Element numbers were not changed in this example for demonstration purposes.*

	A	B	C	D	E	F	G	H	I	J
1		Ls_Num	Ls_Dt	Ls_Can_D	Ls_Rent	Ls_Utl_Am	Hu_Style_	LHA_ATU	LHA_OPF	Hu_Type_
2	4000-XX-99L-PXX325	9900325	9/12/99	1/1/00	$925.00	$130.00	TA	5	36211	U
3	4000-XX-99L-PXX324	9900324	9/10/99	1/1/00	$1,200.00	$150.00	TD	5	36211	F
4	4000-XX-99L-PXX323	9900323	9/27/99	1/1/00	$770.00	$200.00	TA	32	47100	F
5	4000-XX-99L-PXX322	9900322	9/1/99	1/1/00	$850.00	$250.00	AA	5	36211	F
6	4000-XX-99L-PXX320	9900320	9/24/99	1/1/00	$835.00	$120.00	AA	32	47100	F
7		9900319	9/20/99	1/1/00	$547.00	$100.00	AA	32	47100	F
8		9900317	9/24/99	1/1/00	$555.00	$170.00	SS	5	36234	F

Figure F-19 Column with FINCEN Numbers

Step 13 Save your spreadsheet again.

Step 14 To open up the fields in your document for viewing, select the entire document, click the **Format** toolbar option, point to **Column**, click **AutoFormat**, and click **OK**.

Your worksheet is now ready for use.

CAUTION: When sorting an Excel Spreadsheet, make sure you highlight the whole document and indicate that your sheet has a header row prior performing a sort.

Creating Labels from an HMIS Adhoc Report

This section provides instructions for creating labels from an Excel report that has been created by converting an HMIS report.

Step 1 Run your report according to instructions previously received.

Step 2 Convert your file to an Excel Spreadsheet, using the *Converting an HMIS Adhoc Report to Excel* section of this appendix.

Step 3 Save the Excel report.

Step 4 Open Word, and open a new document.

Step 5 Click **Tools.**

Step 6 Click **Mail Merge**.

The Mail Merge Helper dialog box appears (see Figure F-20).

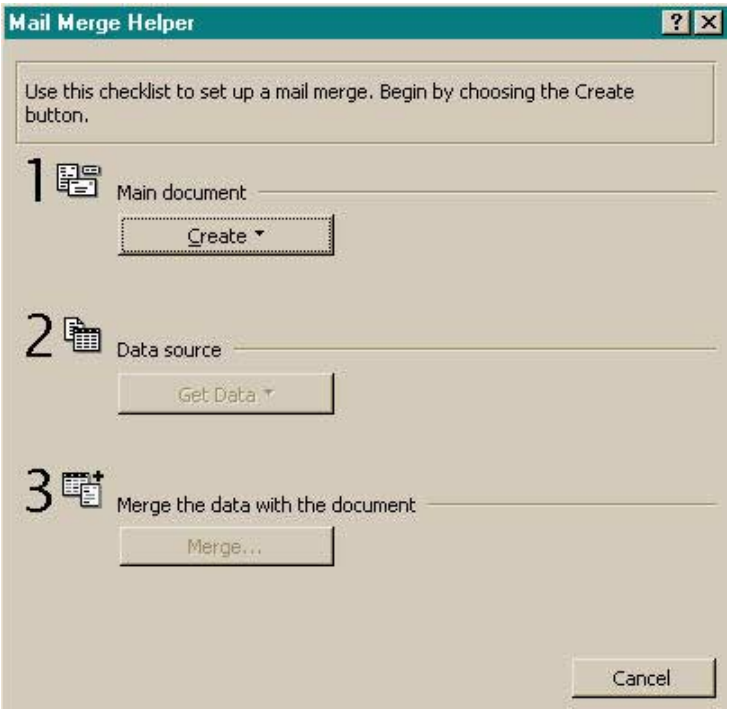


Figure F-20 Mail Merge Helper Dialog Box

Step 7 In section 1, click **Create**, then click **Mailing Labels** (if prompted, select the **Active Window**).

Step 8 In section 2, click **Data Source**, and then click **Open Data Source**.

Step 9 Change your file type to Excel, and select the Excel file you created in Steps 2 and 3.

Step 10 Click **Set Up Main Document**.

Step 11 Select the Label Options according to the type of labels and printer that you have.

Step 12 Click **Insert Merge Field**.

Step 13 Select the fields you want on your labels, pressing **ENTER** after each field (see Figure F-21). Click **OK** when finished.

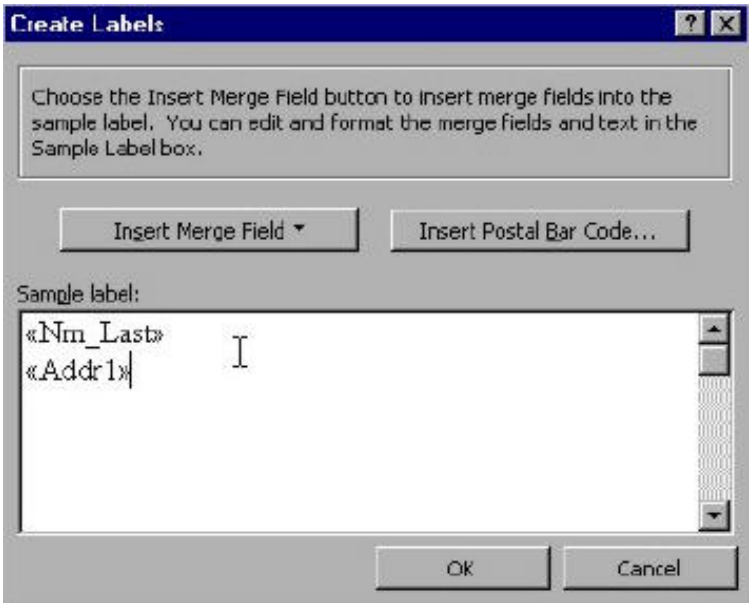


Figure F-21 Create Labels Dialog Box

Step 14 In section 3 of the Mail Merge Helper dialog box, click **Merge**.

Step 15 Click **Merge to New Document**.

Step 16 Click **Merge**.

Labels appear on screen ready for printing.

APPENDIX G
TABLE FIELDS AND DEFINITIONS

Introduction

The following tables are contained within HMIS. Each table contains critical data elements that make up the HMIS application.

Table G-1 Table Definitions

Table	Description
Amenities	The Amenities table describes the features and characteristics of a house.
Application	The Applicant table describes the characteristics of a person applying for housing.
Barracks_Furniture	The Barracks_Furniture table associates a piece of furniture with a barracks room.
Barracks_Room	The Barracks_Room describes the characteristics of a barracks room. Such information as the type of bathrooms and room designation is stored in this table.
Building	The Building table stores information that is common between the different types of housing available through the USCG Housing Program. Information that is common between family, unaccompanied, and unaccompanied personal housing includes address and site responsible for the management of the building.
Claim_Appeal	The Claim_Appeal table describes the characteristics associated with the appeals process of a claim.
Claim_Detail	The Claim table describes the characteristics of claim.
Claim_Person	The Claim_Person table is used to relate a claim, which may share responsibilities to several parties, to a single person.
Complex	The Complex table stores the characteristics associated with a housing complex owned by the lessor.
Dependent	The Dependent table describes the characteristics of a dependent that relies on the support of a person.
FYData	The FYData table is used to store information pertaining to leases during the fiscal year renewal process.
House	The House table describes characteristics associated with a house style dwelling. Information stored in this table includes total square feet of the unit, number of bedrooms, style of house, and so on.
Inspection	The Inspection table contains information associated with the inspection of a housing unit. An inspection is usually associated with a living quarters and an individual, but may be just associated with a living quarters in

Table	Description
	certain circumstances.
Lease	The Lease table contains the agreement details made between a leased house and the lessor.
Lease_Mods	The Lease_Mod table stores information pertaining to modifications made to a lease during lease period.
Lessor	The Lessor table stores the characteristics associated with the person leasing their house to the government.
Living_Quarters	The Living_Quarters table stores information pertaining to the different types of housing offered through the Housing Program (family, unaccompanied, and unaccompanied personal housing). The Living_Quarters table represents the lowest level in which a person may reside according to the housing type. A family housing unit may only be occupied by one person (family). An unaccompanied housing unit may house an individual in each bedroom within a house. An unaccompanied personal housing is associated with barracks and may house one person in each bed in which multiple beds may reside in a single room. The Living_Quarters table also indicates whether the room is vacant or a link to the person occupying the quarters.
NMHC	The NMHC table stores the National Median Housing Cost associated with a person's pay grade.
Person	The Person table contains all members of the USCG and non-members who are entered in the USCG Housing Program.
Site	The site table stores information pertaining to each housing management site. The site table also contains a reference to their parent command according to the housing hierarchical structure.
Tenant_History	The Tenant_History table provides the ability to list all persons who ever resided in a living quarters and also provides the ability to list all of the places a person has resided.
Unit	The Unit table stores every USCG unit and the LHA who is responsible for their housing needs.
Usr_Site	The Usr_Site table indicates which housing site a user works for and the level of the housing site.
Vacancy_History	The Vacancy_History table provides the ability to calculate the cost associated with a vacant living quarters and the reason vacant.
Waiting_List	The Waiting_List table describes the characteristics of someone on a waiting list for housing.

Table G-2 Field Names and Definitions

Table	Field Name	Description
Amenities	Am_Smoking_Allow	Indicates if smoking is permitted in the housing unit
	Am_Monthly_Pest_Control	Indicates the housing unit has monthly pest control
	Ls_Pet_Rest_Txt	Description of any pet restrictions associated with housing unit
	Am_Sprinkler	Indicates the housing unit has fire sprinkler system
	Am_Smoke_Detector	Indicates the type of smoke detector a housing unit has
	Am_Carbon_Monox	Indicates the housing unit has a carbon monoxide detector
	Am_Porch_Ind	Indicates the housing unit has a screened porch
	Am_Grounds_Ind	Indicates the occupant is responsible for the grounds maintenance
	Ls_Pet_Ind	Indicates whether the lessor permits pets in the housing unit
	Am_Shed_Ind	Indicates the housing unit has a utility shed
	Ls_Child_Ind	Indicates whether the lessor permits child care in the unit
	Am_Hookup_Ind	Indicates the housing unit has washer/dryer hookups only
	Am_Other3_Txt	The text description of the OTHER amenity in contract
	Am_Other3_Ind	Indicates the housing unit has an OTHER amenity not listed
	Am_Other2_Txt	The text description of the OTHER amenity in contract
	Am_Other4_Ind	Indicates the housing unit has an OTHER amenity not listed

Table	Field Name	Description
Amenities (continued)	Am_Other4_Txt	The text description of the OTHER amenity in contract
	Am_Security_System	Indicates the housing unit has a security alarm
	Ls_Water_Bed	Indicates whether a lease allows a water bed
	Am_Security_Guard	Indicates the housing unit is surveyed by a security guard
	Am_Other2_Ind	Indicates the housing unit has an OTHER amenity not listed
	Am_Other_Txt	The text description of the OTHER amenity in contract
	Ls_Smoking	Indicates whether a lease allows smoking in the unit
	Am_Other_Ind	Indicates the housing unit has an OTHER amenity not listed
	Last_Mod_Dt	The date this record was last modified
	Am_Flooring2_Cd	Indicates the secondary flooring of the housing unit
	Am_Flooring_Cd	Indicates the primary flooring of the housing unit
	Am_Carpet_Ind	Indicates the housing unit has wall to wall carpeting
	Am_Cen_Ac_Ind	Indicates the housing unit has central air conditioning
	Am_Win_AC_Ind	Indicates the housing unit has an air conditioning unit
	Hu_Heat	The type of heating for this housing unit
	Br_Num	For UPH this is the room number associated with the amenities
	Building_ID	A unique identifier and composite key made up of Hu_Type_Cd, AHA_ATU, LHA_ATU, LHA_OPFAC, and HU_Seq

Table	Field Name	Description
Amenities (continued)	Am_WinCover_Ind	Indicates the housing unit has blinds or other window coverings on the windows
	Am_Basement	Indicates the housing unit has a basement
	Am_Handicapped_Access	Indicates the housing unit is handicap accessible
	Am_Dryer_Ind	Indicates the housing unit has a dryer only
	Am_Hood_Ind	Indicates the housing unit has a range exhaust hood
	Am_Dish_Ind	Indicates the housing unit has a dishwasher
	Am_Microwave	Indicates the housing unit has a microwave oven
	Am_Gar_Dis_Ind	Indicates the housing unit has garbage disposal
	Am_Washer_Ind	Indicates the housing unit has a washer only
	Am_Fence_Ind	Indicates the housing unit has a fenced yard
	Am_Parking	Indicates the number of parking spaces allocated to the housing unit
	Am_Garage	Code describing the type of garage associated with a housing unit
	Am_Stove_Ind	Indicates the housing unit has a stove
	Am_Refrig_Ind	Indicates the housing unit has a refrigerator
	Am_Cfan_Ind	Indicates the housing unit has ceiling fans
	Am_Fire_Ind	Indicates the housing unit has a fireplace
Application	Appl_Id	Auto-counter used as unique id for application record
	Person_Id	Foreign Key to Person
	Application_Rec_Dt	The date the application was received on
	Dod_File_Dt	Date application for DoD housing was filed
	Home_Phone	The applicant's home phone number

Table	Field Name	Description
Application (continued)	In_Dt	The date the applicant occupied the housing unit
	Out_Dt	The date the applicant vacates housing
	Skedout_Dt	The date the occupant is scheduled to leave the barracks
	Keys_Issued	The identifier for the keys issued to the applicant
	Pet_Txt	The description of the applicant's pets
	Smoking_Ind	Indicates the occupant is a smoker
	Status_Cd	The occupant status code
	Weapons_Ind	Indicates if the applicant possesses/owns any weapons
	Weapons_Txt	The descriptions of the applicant's weapons
	Weapons_Txt2	The descriptions of the applicant's weapons
	Work_Phone	The applicant's work phone number
	Last_Mod_Dt	The date this record was last modified
	On_Promo_List	Indicates the applicant is on the promotion list
	Pet_Ind	Indicates if the applicant has pets
	New_Duty_Station_Phone	The applicant's new duty station's phone number
	New_Duty_Station	The applicant's new duty station
	Est_Arrival_Dt	The applicant's estimated arrival date
	Dep_Mar_Status	Dependent Status
	Spouse_Resides	Indicates if the spouse resides with the applicant
	Preg_Ind	Indicates if the member/spouse is pregnant
	Exp_Del_Date	Expected delivery date of mother
	Civ_Housing_Waiver	Indicates if the applicant has a civilian housing waiver

Table	Field Name	Description
Barracks_Furniture	Serial_Num	The furniture item's serial number
	Furn_Item	Furniture item name such as rack, dresser, desk, chair, and so on.
	Acq_Yr	Year the furniture item was acquired
	Furn_Cost	The furniture's cost
	Furn_Id	Sequential number for items in the bedroom
	Br_Num	The bedroom number where the furniture resides
	Building_ID	A unique identifier and composite key made up of Hu_Type_Cd, AHA_ATU, LHA_ATU, LHA_OPFAC, and HU_Seq
Barracks_Room	Br_Beds	The total number of beds in a barracks room
	Br_Bath_Cd	Indicates the code for the head type for this room
	Br_Sqft	The total square footage of a UPH bedroom
	Diverted_Rmks	The reason the barracks room was diverted
	Diverted_Ind	Indicates the barracks room was diverted
	Diverted_Dt	The date the barracks room was diverted
	Br_Stat_Cd	Status code indicating whether a whether a barracks is active, diverted, or purged
	Br_Num	The bedroom number for a UPH unit
	Br_Desig	The UPH bedroom designation (PP=permanent party, TR=transient)
	Building_ID	A unique identifier and composite key made up of Hu_Type_Cd, AHA_ATU, LHA_ATU, LHA_OPFAC, and HU_Seq
	Br_Rehab	Year the last major rehabilitation was completed for this room
	Br_Built_Yr	Year the room was built
	Br_Sex	The sex designation of the barracks room

Table	Field Name	Description
Barracks_Room (continued)	Br_Type	The type of UPH bedroom in the barracks
Building	Building_ID	A unique identifier and composite key made up of Hu_Type_Cd, AHA_ATU, LHA_ATU, LHA_OPFAC, and HU_Seq
	Site_Type	This is the type of site:HQ, MLC, AHA, LHA, UPH, HR
	Site_ATU	The ATU of the housing site
	Site_OPFAC	The OPFAC of the housing site
	HU_SEQ	Sequential number generated at the LHA level
	MLC	Military Logistics Command: ATL or PAC
	AHA	Area Housing Authority responsible for the building
	LHA_ATU	Local Housing Authority ATU responsible for the building
	LHA_OPFAC	Local Housing Authority OPFAC responsible for the building
	HU_ATU	The ATU of the unit which the housing unit services
	HU_OPFAC	The ATU of the unit which the housing unit services
	Barracks_Name	Name of the Barracks
	HU_Type_Cd	Indicates the type of housing offered by the building. Either family, unaccompanied, or unaccompanied personal housing.
	HU_Stat_Cd	The housing unit status code
	Build_Yr	The year the building was built
	Total_Rooms	The total number of rooms in the building
	Hu_Br	The total number of bedrooms is a building
	Addr1	The first line of the housing unit street address

Table	Field Name	Description
Building (continued)	Addr2	The second line of the housing unit street address
	City	The name of the city where the building is located
	State	The two letter state abbreviation for the building location
	Zip	The zip code for the building location
	HU_County	The name of the county where the housing unit is located
	Rehab_Dt	Date of the last major rehabilitation for this housing unit
	Env_Ind	Indicates whether an environmental assessment has been completed
	Env_Dt	Date the environmental assessment was completed for the building
	Diverted_Ind	Indicates the building was diverted
	Diverted_Dt	The date the building was diverted
	Diverted_Rmks	The reason the building was diverted
	Last_Mod_Dt	The date this record was last modified
Claim_Appeal	Appl_Sttl_Amt	The settlement amount of an appeal
	Appeal_Date	The date of an appeal
	Demand_Dt	The date the demand letter was sent to the lessor
	Demand_Ltr_Sent	Indicates a demand letter was sent to the lessor
	Claim_Appeal_ID	Auto counter to uniquely identify an appeal
	Appeal_Type	Indicates the type of appeal
	Claim_ID	Sequential number to uniquely identify a claim
	Person_Id	Auto-counter Id
Claim_Detail	Claim_ID	Sequential number to uniquely identify a claim

Table	Field Name	Description
Claim_Detail (continued)	Building_ID	A unique identifier and composite key made up of Hu_Type_Cd, AHA_ATU, LHA_ATU, LHA_OPFAC, and HU_Seq
	Room_Num	Room number associated with the living quarters of the claim
	Bed_Num	Room number associated with the living quarters of the claim
	Clm_Dt	The date of the claim by the lessor against the government
	Appeal_Ind	Indicates whether the lessor appeals the settled claim amount
	Clm_Amt	The claim amount demanded by lessor for damages
	Clm_Rmks	Description of any special claim remarks
	Closed_Dt	The date the claim is closed
	Closed_Ind	Indicates whether the claim is closed
	Fincen_Dt	The date the SF30 was sent to the Finance Center
	Judge_Amt	The court judgement amount
	Last_Mod_Dt	The date the record was last modified
	Pay_Dt	Date payment authorized by the Contracting Officer and sent to Finance
	Rcvd_Dt	Date the claim was received by the Housing Officer
	Reason_Cd	The claim reason code
	Rec_Amt	The recoupment amount the government receives from lessee
	Rec_Rmks	Description of the follow-up recoupment action required
	Rec_Type	Specifies the record type as house, room, or bed
	Shared_Ind	Indicates this claim has shared liability

Table	Field Name	Description
Claim_Detail (continued)	Sttl_Amt	The settled claim amount between lessor and the Government
	Sttl_Dt	Date the claim was settled between lessor and Government
	Valid_Dt	Date the housing unit is approved/validated by AHA
	Valid_Ind	Indicates the housing unit is approved/validated by AHA
	Damage_Reason_Txt	The cause of the damage
	Reopen_Dt	The date the claim was reopened
	Reason_Other_Txt	Text description if 'other' chosen from reason pick list
Claim_Person	Sttl_Amt	The settlement amount for the claim
	Sttl_Dt	The date a settlement was reached
	Payment_Cd	Indicates the type of payment
	Payment_St	Indicates the status of the payment
	Claim_ID	Part of the primary key of the claim_detail table
	Liability_Amt	The amount the person is liable for
	Person_Id	Auto-counter Id
Complex	Lease_Id	Auto-Counter to track leases since a housing unit can have multiple leases
	Hu_Devel_Poc	The POC for the housing development
	Hu_Devel_Phone	The development contact's phone number or the lessor's phone
	Hu_Devel_Em	The emergency contact telephone number for the housing development
	Lr_Chk_Addr1	The first line of the lessor's check mailing address
	Lr_Chk_Addr2	The second line of the lessor's check mailing address

Table	Field Name	Description
Complex (continued)	Lr_Chk_Addr3	The third line of the lessor's check mailing address
	Lr_Chk_Addr4	The fourth line of the lessor's check mailing address
	Lr_Cor_Addr1	The first line of the address to which correspondence should be sent to the lessor
	Lr_Cor_Addr2	The second line of the address to which correspondence should be sent to the lessor
	Lr_Cor_Addr3	The third line of the address to which correspondence should be sent to the lessor
	Lr_Cor_Addr4	The fourth line of the address to which correspondence should be sent to the lessor
	Building_Id	Link back to Lease
Dependent	Dep_Id	Sequence number to uniquely identify Dependent
	Mbr_SSN	The Social Security Number of the dependent
	CG4170_Dt	The effective date of member's most recently submitted CG-41
	Dep_BAQ_Dt	The date a member begins support of a dependent, for example, birth date
	Dep_Birth_Dt	The birth date of the dependent
	Dep_Sex	The sex of the dependent: (M)ale, (F)emale
	Dep_With_Mbr	Indicates whether the address of the dependent is the same as the member
	Dep_Rel_Cd	Indicates the sex and relationship of a member's dependent
FYData	Lease_Id	Auto-Counter to track leases since a housing unit can have multiple leases
	Ls_Old_Num	The previous lease number for this house
	Fyk_New_Ls	Contract number to be used for the new SF-2A during FY renewal

Table	Field Name	Description
FYData (continued)	Fyk_Dt	Start date of new contract to continue beyond its last option
	Fyk_Opt_Yr	The option year to be used on the new SF-2A
	Fyk_Done	Indicates the lessor response of whether to renew a lease
	Fyk_Rent_Amt	The rent amount for the upcoming fiscal year
	Fyk_Util_Amt	The utilities amount for the upcoming fiscal year
	Fy_Ltr_Sent	Indicates if the fiscal year renewal letter was sent to lessor
	Fy_Renew	Indicates if the lease is up for renewal
	Fy_Change	Indicates if there was a increase or decrease in rent
	Fy_Sent	Indicates if the lease was sent to the lessor
	Fy_Received	Indicates if the lease was received from the lessor
	FY_Action	Fiscal Year Action added after picklist examination
House	Hu_TBaths	The total number of bathrooms in the housing unit
	Hu_Unadq_Dt	The date the housing unit became inadequate
	Hu_Style_Cd	Indicates the code for the design classification of housing unit
	Hu_Sqft	Square footage of housing unit's living area
	Ls_Utl_Amt	The monthly utility amount as shown in clause 3 of SF-2
	Dist	The congressional district of the housing unit
	Ls_Utl_Ind	Indicates if the cost of utilities is included on SF-2

Table	Field Name	Description
House (continued)	Ls_Rent	Monthly rent amount minus the utilities cost for the housing unit
	DOD_Gov_Ls_Ind	Indicates the housing unit is a Government lease for DOD members
	Ls_Valid_Ind	Indicates the housing unit is approved
	Ls_Dt	Date or original government obligation or date of initial occupancy
	Ls_Can_Dt	Date the lease for the housing unit is canceled or terminated
	Class_Cd	Indicates Leased, ISSA or Owned housing units
	Ls_Num	The lease number of a lease
	Building_ID	A unique identifier and composite key made up of Hu_Type_Cd, AHA_ATU, LHA_ATU, LHA_OPFAC, and HU_Seq
	Hu_Exempt_Ind	Indicates the housing unit is exempt from admin cost ceiling
	Hu_Devel	The site name or complex name for the housing unit
	Convert_Dt	The date the housing unit's type is changed
	Hu_Desig_Cd	The quarters designation code established for the owned quarters
	Hu_Cost_Ctr	The five digit cost center code for the housing unit (owned only)
Inspection	Ins_Comments	The comments of an inspection
	Ins_Date	The date of the inspection
	Inspector	The name of the inspector performing the inspection
	Ins_Other_Txt	Text description of other inspection
	WrkOrd_Sub_Dt	Date work order was submitted
	HU_Ready_Dt	The date the housing unit is ready

Table	Field Name	Description
Inspection (continued)	Building_ID	A unique identifier and composite key made up of Hu_Type_Cd, AHA_ATU, LHA_ATU, LHA_OPFAC, and HU_Seq
	Inspection_Id	Auto-Counter to uniquely identify an inspection
	Ins_Cd	The inspection type
	Person_Id	Associates an inspection with a person
	Room_Num	A unique identifier assigned to a room for unaccompanied and unaccompanied personnel housing type
	Bed_Num	A unique identifier for each bed associated with unaccompanied personnel housing
Lease	Ls_Rent_Amt	Monthly rent amount minus the utilities cost for the housing unit
	Ls_ReInstated_Dt	The date the housing unit lease was reinstated
	Ls_Opt_Yr	Last two digits of the option year identified in Clause 5, SF-2
	Ls_Utl_Ind	Indicates if the cost of utilities is included on SF-2
	Ls_Utl_Amt	The monthly utility amount as shown in clause 3 of SF-2
	Building_ID	A unique identifier and composite key made up of Hu_Type_Cd, AHA_ATU, LHA_ATU, LHA_OPFAC, and HU_Seq
	Lease_Id	Auto-Counter to track leases since a housing unit can have multiple leases
	Pred_Can_Dt	The date the housing unit is predicted to be canceled
	Ls_Num	Lease Number
Lease_Mods	Lease_Id	Auto-Counter to track leases since a housing unit can have multiple leases
	Ls_Seq	The sequence number of the lease modification

Table	Field Name	Description
Lease_Mods (continued)	Effect_Dt	The effective date of a lease modification
	Ls_Rent_Amt	Rent modifications to a lease
	Ls_Util_Amt	Utilities modification to a lease
	Type_of_Mod	Indicates the reason for the lease modification
	Descr_Of_Mod	Description of the lease modification
	Mod_Start_Dt	Start date for lease modification
	Mod_End_Date	End date for lease modification
	Waiver_Ind	Lessor option to waive 30 day notice
	Mod_Addr1	Address modification to a lease
	Mod_Addr2	Address modification to a lease
	Mod_Addr3	Address modification to a lease
	Ls_Num	The lease number of a lease
	Mod_Approve_Ind	Indicates that the lease modification has been approved
	Ls_COTR	COTR modification to a lease
	Mod_Addr4	Address modifications to a lease
Lessor	Lease_Id	Auto-Counter to track leases since a housing unit can have multiple leases
	Ls_Tax_Cd	The tax code used in the introductory clause of SF-2
	Lr_Agent_Ind	Indicates if the lessor is an agent as described in intro clause SF-2
	Lr_Own_Ind	Indicates if the lessor is the owner as described in SF-2
	Lr_Fed_Ind	Indicates if the owner of the housing unit is a federal employee
	Lr_Lessor1	The name of the primary lessor of the housing unit
	Lr_Lessor2	The name of the secondary lessor of the housing unit

Table	Field Name	Description
Lessor (continued)	Lr_Lessor3	The tertiary lessor of the housing unit
	Lr_Owner1	The housing unit owner's name
	Lr_Owner2	The second housing unit owner's name
	Lr_Owner3	The tertiary housing unit owner's name
	Ls_Deed_Att_Ind	Indicates if the deed of ownership is attached to the SF-2
	Ls_Deed_Of_Ind	Indicates if the deed of ownership is on file with the Contracting Officer
	Ls_Pow_Att_Ind	Indicates if the Power of Attorney Agreement is attached
	Ls_Pow_Of_Ind	Indicates if the Power of Attorney/Management Agreement is on file
	Building_Id	Link back to Lease
Living_Quarters	Reason_Vacant	Indicates the reason the occupant vacates the housing unit
	Avail_Cd	Specifies if a record can be and is occupied or not
	Vac_Rmks	Any remarks about why the occupant is vacating the housing unit
	Building_ID	A unique identifier and composite key made up of Hu_Type_Cd, AHA_ATU, LHA_ATU, LHA_OPFAC, and HU_Seq
	Person_Id	Auto-counter Id
	Room_Num	For unaccompanied and unaccompanied personal type housing, this is the room number in which someone may reside
	Bed_Num	Indicates the bed number in a barracks room
NMHC	Pay_Grade	The pay grade code
	With_Amt	The National Median Housing Cost for the pay grade with dependents

Table	Field Name	Description
NMHC (continued)	NMHC_Amt	The National Median Housing Cost for this pay grade
	Without_Amt	The National Median Housing Cost without dependents
	PDS_Ind	Indicates if the record is from the Personnel Decision Support system
Person	Person_Id	Auto-counter Id
	SSN	The Coast Guard member's social security number
	Nm_Last	The person's last name
	Nm_First	The person's first name
	Nm_MI	The person's middle initial
	Nm_Suff	The suffix of the person's name
	Sex	Indicates the person's sex
	Birth_Dt	The person's date of birth
	Mar_Stat	Indicates the person's martial status
	ATU	ATU of the unit
	OPFAC	OPFAC of the unit
	Rank_Abbrev	The person's rank abbreviation
	Rank_Dt	Date person was last promoted or reduced to current rank
	Pay_Grade	The person's pay grade
	Rot_Dt	The person's expected date for leaving current assignment
	Rot_Reason	Reason the person is due to rotate
	BAH_Cd	The person's pay grade
	BAH_Amt	The amount the member receives for Basic Allowance for Housing
	Num_Dep	The person's number of dependents
	Spouse_Sv_Cd	Indicates if the person's spouse is in the Armed Forces

Table	Field Name	Description
Person (continued)	Rpt_Dt	The date the member reports
	Service_Cd	The service with which the member has been associated
	Extend_Dt	The person's extend date
	PDS_Ind	Indicates if the record is from the Personnel Decision Support system
Site	Site_Type	This is the type of site: HQ, MLC, AHA, LHA, UPH, HR
	Site_ATU	The ATU of the housing site
	Site_OPFAC	The OPFAC of the housing site
	Site_Name	The site name
	Site_Phone	The site phone number where Contracting Officer may be reached
	Site_Addr1	The first line of the site address
	Site_Addr2	The second line of the site address
	Site_Addr3	The third line of the site address
	Site_Addr4	The fourth line of the site address
	Last_HU_Seq	The last sequence number used for a housing unit
	Ls_COTR	The Contracting Officer to print on leases
	AHA_Cd	Area Housing Authority Code of the housing site
	Contract_Site	The site number
	Accntg_Data	Accounting string for printing the lease
	Accntg_Data2	Accounting string for UPH leases
	AcctgProgElem	The program element code established for the housing site
	AcctgCostAcct	The cost center code that appears in the lease number
	Allowance	The maximum funding level for the AHA for the fiscal quarter

Table	Field Name	Description
Site (continued)	Doc_Type_Num	The two-character finance center prefix used in contract number
	Avg_Cost_Amt	The average cost limitation for the AHA current FY quarter
	Out_Of_Pocket	The out-of-pocket expense percentage
	New_FY	The new fiscal year for the fiscal year renewal process
	Parent_Type	This is the type of the parent site: HQ, MLC, AHA, LHA, UPH, HR
	Parent_ATU	Foreign Key to Site_ATU of parent unit
	Parent_OPFAC	Foreign Key to Site_OPFAC of parent unit
Tenant_History	Vac_Rmks	Any remarks about why the occupant vacated the housing unit
	Reason_Left	Indicates the reason the occupant vacates the housing unit
	Out_Date	The date the applicant vacates the housing unit
	Ls_Num	Lease Number used to link back to lease for history purpose
	Rank_Abbrev	Rank of the person while occupying unit; used to link back to lease for history purpose
	Ls_Rent	Rent while person was occupying unit; used to link back to lease for history purpose
	Ls_Utl_Amt	Utility Amount while person was occupying unit; used to link back to lease for history purpose
	Building_ID	A unique identifier and composite key made up of Hu_Type_Cd, AHA_ATU, LHA_ATU, LHA_OPFAC, and HU_Seq
	Br_Desig	The UPH bedroom designation (PP=permanent party, TR=transient)
	Br_Type	The type of UPH bedroom in the barracks

Table	Field Name	Description
Tenant_History (continued)	Wl_Control_Dt	Established using section 6.D.8.a of USCG Housing Manual
	Wl_Exempt_Exp_Dt	The date the applicant's limited exemption expires
	Wl_Exempt_Type	The exemption type code
	Tenant_Hist_Id	Auto-counter to uniquely identify each instance of a Ten
	In_Date	The date the applicant occupied the housing unit
	Person_Id	Auto-counter Id
	Room_Num	For unaccompanied and unaccompanied personal type housing, this is the room number in which someone may reside
	Bed_Num	Bed number assigned to tenant
Unit	ATU	ATU of the unit
	OPFAC	The OPFAC of the unit
	Site_Type	This is the type of site: HQ, MLC, AHA, LHA, UPH
	Site_ATU	ATU of responsible LHA for unit
	Site_OPFAC	OPFAC of responsible LHA for unit
	Unit_Name	The name of the unit
Usr_Site	Site_Type	This is the type of site: HQ, MLC, AHA, LHA, UPH
	Site_ATU	The ATU of the housing site
	Site_OPFAC	The OPFAC of the housing site
	NT_UserName	Windows NT User Name
Vacancy_History	End_Vac_Dt	Date the unit become occupied
	Start_Vac_Dt	Date occupant departed
	Reason_Vacant	The reason the room was vacant
	Vac_Rmks	The text description why the unit was vacant

Table	Field Name	Description
Vacancy_History (continued)	Vac_Hist_ID	Auto-Counter used as unique id for Vacancy History
	Bed_Num	Indicates the bed number in a barracks' room
	Building_ID	A unique identifier and composite key made up of Hu_Type_Cd, AHA_ATU, LHA_ATU, LHA_OPFAC, and HU_Seq
	Room_Num	For unaccompanied and unaccompanied personal type housing, this is the room number in which someone may reside
Waiting_List	Person_Id	Auto-counter Id
	Site_Type	This is the type of site: HQ, MLC, AHA, LHA, UPH, HR
	Site_ATU	The ATU of the housing site
	Site_OPFAC	The OPFAC of the housing site
	WL_Priority	The priority of the person on the waiting list
	Wl_Br	The bedroom waiting list for which the applicant qualifies
	Wl_Class_Cd	The housing unit class type for which the applicant qualifies
	Wl_Control_Dt	Established using section 6.D.8.a of USCG Housing Manual
	WI_Conv_Cd	Indicates the reason the applicant is requesting a convenience move
	Wl_Conv_Ind	Indicates whether the applicant is awaiting a convenience move
	Wl_Exempt_Type	The exemption type code
	Wl_Exempt_Exp_Dt	The date the applicant's limited exemption expires
	Wl_Hold_Ind	States if housing unit application is "on hold"

Table	Field Name	Description
Waiting_List (continued)	Wl_Hold_Rmks	The reason for placing the application "on hold"
	Wl_Insked_Addr	The applicant's scheduled housing assignment street address
	Wl_Insked_Dt	The date the applicant is to be assigned housing
	Wl_Needs_Ind	Indicates if the applicant has any special needs for housing
	Wl_Need_Dt	The date by which the applicant needs housing
	Wl_Needs_Rmks	The explanation for the applicant's special housing needs
	Wl_Qtrs_Desig_Cd	The quarter's designation code for owned housing units only
	Wl_Remove_Cd	Indicates the applicant is removed from waiting list
	Wl_Remove_Dt	The date the applicant is removed from the waiting list
	Wl_Remove_Rmks	The reason the applicant was removed from the waiting list
	Wl_Stable	Indicates if the applicant is to be stabilized
	Wl_Type_Cd	The housing type for which the applicant is waiting
	Last_Mod_Dt	The date the record was last modified
	Wl_AHA_Cd	The Area Housing Authority the person is on the waiting list for

Table G-3 Field Codes

Field codes description values that are used primarily in reports are provided in Table G-2.

Field Name	Value	Display Value
Reason_Cd	A	Check-In
	B	Annual
	C	Pre-Check-Out
	D	Check-Out
	E	For Cause
	F	Pre-Lease
	G	Other
Dep_Sex	0	Male
	1	Female
Hu_Style_Cd	AA	Apartment
	SA	Single Story Townhouse
	SD	Detached One Story
	SS	Single Story Duplex
	TA	Two Story Townhouse
	TD	Detached Two Story
	TS	Two Story Duplex
	UPH	Barracks
	ZA	Three Story Townhouse
	ZD	Detached Three Story
	ZS	Three Story Duplex
Sex	0	Male
	1	Female
Reason_Left	0	Leased Discontinued
	1	PCS
	2	Service Separation
	3	Death of Member

Field Name	Value	Display Value
Reason_Left (continued)	4	Loss of Dependents
	5	Member Request
	6	Convenience Move, Member Request
	7	Convenience Move, Government Request
	8	Eviction
	9	Phase Out
	10	Abandon
	11	Inadquate
Status_Cd	ADASIG	Temporary Duty - Administratively Assigned
	DUTY	Duty Watchstander/Crewmember
	IGEO	Involuntary Geographic Bachelor
	NDT	Non-Duty Transient; Leave/Liberty/Retired status
	PCSDUI	Students Assigned Instructions
	TAD	Temporary Additional Duty - General Duty
	TADMED	Temporary Additional Duty - Medical Care
	TEMDUI	Student Assigned Instruction
	UP	Unaccompanied Permanent Party: Bachelor Personnel
	VGEO	Voluntary Geographic Bachelor
	AUX	Auxiliary
	CIV	Civilian
	FORMIL	Foreign Military
	OTHER	Other
HU_Stat_Cd	1	Active
	2	Inactive
	3	Diverted
	4	Inadequate
	5	Converted
	6	Purged

Field Name	Value	Display Value
Dep_Rel_Cd	A	Adopted
	F	Father
	H	Husband
	I	Illegitimate
	L	Legitimate
	M	Mother
	S	Step
	W	Wife
	Z	Legal Ward
FY_Action	R	Renew
	M	Modification
	C	Cancel
	N	Not Applicable
Hu_Desig_Cd	A	Flag
	B	Command
	C	Captain
	D	Senior Officer
	E	Junior Officer
	F	Senior Enlisted
	G	Junior Enlisted
	H	Officer
	I	Enlisted
	J	Non-Rated
	O	Other
	N	Not Applicable
Br_Bath_Cd	1	Private
	2	Shared
	3	Community

Field Name	Value	Display Value
Br_Desig	PP	Permanent Party
	TR	Transient
Br_Type	CPO	Chief Petty Officer
	NR	Nonrate
	O	Officer
	OOD	Officer of the Day
	PC	Permanent Party Civilian
	PO	Petty Officer
	PSE	PCS Student Enlisted/Cadet
	PSO	PCS Student Officer
	SE	Student Enlisted/Cadet/OCS
	SO	Student Officer
	TE	Transient/Reserve/Student Enlisted/Recruit
	TO	Transient/Reserve/Student Officer
	WE	Watchstander Enlisted
	WO	Watchstander Officer
	TC	Transient Civilian
	GEO	Geographic Bachelor
Hu_Type_Cd	U	Unaccompanied
	F	Family
	B	Barracks
Site_Type	AHA	Area Housing Authority
	HQ	Headquarters
	LHA	Local Housing Authority
	UPH	Barracks Manager
	HR	Housing Rep
	MLC	Maintenance and Logistical Command
Class_Cd	G	Government Owned

Field Name	Value	Display Value
Class_Cd (continued)	L	Leased
	I	ISSA
Payment_Cd	1	Voluntary Payment
	2	Voluntary PAA
	3	Involuntary PAA
	4	Like In Kind
Payment_St	1	Recoupment Pending
	2	Waiver
	3	Compromise
	4	Member Discharge/Letter to PPC complete
	5	LHO Review Requested
	6	AHO Review Requested
	7	Paid
Reason_Vacant	A	Male Unaccompanied Bed/Bedroom Vacant
	B	Female Unaccompanied Bed/Bedroom Vacant
	C	Awaiting PCS Member
	D	Reserved for Member Already On Board
	E	Lease Being Canceled
	F	No Eligible Applicants
	G	Damage Assessment or Renovation
	H	Major Repairs or Renovations
	I	Inadequate
	J	Reserved for Key/Essential Personnel
	K	Diverted to UPH
	L	Diverted to Other Use (Enter Remarks to Explain)
	M	Awaiting Entry Approval
	N	New Lease
	O	Change of Occupancy Maintenance

Field Name	Value	Display Value
Smoking_Ind	0	Non-Smoker
	1	Smoker
Weapons_Ind	0	No Weapons
	1	Weapons
Ins_Cd	A	Check-In
	B	Annual
	C	Pre-Check-Out
	D	Check-Out
	E	For Cause
	F	Pre-Lease
	G	Other
Mar_Stat	A	Annulled
	D	Divorced
	I	Interlocutory
	L	Legally Separated
	M	Married
	S	Single
	W	Widowed
Service_Cd	USCG	U.S. Coast Guard
	USAF	U.S. Air Force
	USA	U.S. Army
	USN	U.S. Navy
	USMC	U.S. Marine Corps
	USCGR	U.S. Coast Guard Reserves
	USAG	U.S. Army National Guard
	NOAA	National Oceanic Atmospheric Administration
	FAA	Federal Aviation Administration
	FBI	Federal Bureau of Investigation

Field Name	Value	Display Value
Service_Cd (continued)	USPS	U.S. Public Health Service
	SP	State Police
	LP	Local Police
	USSS	U.S. Secret Service
	USCGA	U.S. Coast Guard Auxiliary
	FORM	Foreign Military
	FEMA	Federal Emergency Management Association
	MEP	Marine Environmental Police
	NPS	National Park Service
	OTHER	Other
WI_Conv_Cd	1	Additional Bedroom Needed
	2	Medical
	3	Convenience of Government
	4	Occupant Request
Wl_Exempt_Type	1	Individual Exemption
	2	Blanket Exemption
WI_Priority_Cd	1	Flag and Command Quarters
	2	Key and Essential Personnel
	3	Deploying Personnel
	4	Special Needs
	5	Normal
	6	Other Services
WI_Remove_Cd	1	Decline
	2	Orders Canceled
	3	Other
WI_Qtrs_Desig_Cd	1	Officer
	2	Enlisted
Am_Flooring_Cd	1	Tile

Field Name	Value	Display Value
Am_Flooring_Cd (continued)	2	Carpet
	3	Vinyl
	4	Hardwood Floor
	5	Linoleum
	6	Other

Table G-4 BAH Code Entitlements

BAH Code	Entitled to BAH	Meaning
A	No	with dependents: member and/or dependents assigned adequate **CG-owned family** quarters
B	No	with dependents: member and/or dependents assigned adequate **CG-leased family quarters**
C	No	with dependents: member and/or dependents assigned adequate **DOD-owned family quarters**
D	Yes (partial)	without dependents, or spouse in service and no other dependents: member assigned adequate **CG-owned single quarters** (**barrack** or **ship board berthing**)
E	No	without dependents, or spouse in service and no other dependents: member assigned adequate **CG-leased quarters**, **CG-owned family quarters**, or **DOD owned family quarters**
F	Yes (partial)	without dependents, or spouse in service and no other dependents: member assigned adequate **DOD-owned single quarters** (**barrack** or **ship board berthing**)
G	Yes (single)	without dependents: member not assigned government quarters
H	Yes (single)	spouse in service and no other dependents: member not assigned government quarters
I	Yes	with dependents: member assigned inadequate **CG-owned family quarters**; checkage for rental charge
K	Yes	with dependents: member assigned inadequate **DOD-owned family quarters**; checkage for rental charge
L	Yes	with dependents: member not assigned government quarters; also applies to geographic bachelors when dependents do not reside with member and the member is assigned to **barracks** or **shipboard berthing**
M	Yes (partial)	officer without dependents, or spouse in service and no other dependents, or enlisted member with spouse in service and no other dependents: assigned inadequate **CG-owned quarters**, checkage for rental charge

BAH Code	Entitled to BAH	Meaning
N	Yes (partial)	Officer without dependents, or spouse in service and no other dependents, or enlisted member with spouse in service and no other dependents: assigned inadequate **DOD-owned quarters**, checkage for rental charge

APPENDIX H
SAMPLE ADHOC REPORTS

Occupant Information

Description

This query provides information about an occupant's name, address, class, type, BAH code. This query is used to validate that occupants are not getting overpaid by matching the BAH code and the type of housing.

NOTE: *The ∆ symbol represents a space.*

```
SELECT
Person.Nm_Last,Person.Nm_First,House.Ls_Num,Building.Addr1,Building.City,Building.Hu_Type_Cd,House.Class_Cd,Person.BAH_Cd,Living_Quarters.Room_Num,Building.AHA,Building.LHA_ATU,Building.LHA_OPFAC,Tenant_History.In_Date
FROM
(Living_Quarters),(Person),(Building),(House),(Tenant_History)
WHERE
Living_Quarters.Building_ID∆=∆Building.Building_Id∆and∆Living_Quarters.Person_ID∆=∆Person.Person_ID∆and∆Living_Quarters.Person_ID∆=∆Tenant_History.Person_ID∆and∆(Tenant_History.Out_Date∆is∆null∆or∆Tenant_History.Out_Date∆=∆#Jan∆1,∆1900#)∆and∆Living_Quarters.Building_ID∆=∆House.Building_ID∆and∆Building.AHA∆=∆"01"
ORDER∆BY
Building.AHA,∆Building.LHA_OPFAC
```

Changes You Need to Make

To make this unique to your AOR, change the following:

- Change **`Building.AHA =`** *your AHA* or delete it.
- If you are an LHO, delete **`AHA`** in **`WHERE`** clause, add the **`Building.LHA_OPFAC`** to the **`WHERE`** clause, and specify a particular *LHA* (for example, **`Building.LHA_OPFAC∆=∆"20115"`**).

The following are optional changes:

- Add **`Person.BAH_CD`** to the **`WHERE`** clause.
- Enter a specific *BAH_CD*.

Cancel Leases

Description

This query provides a listing of leases that were canceled during a specific time period.

NOTE: *The ∆ symbol represents a space.*

```
SELECT
Distinct
Lease.Ls_Num,House.Ls_Dt,House.Ls_Can_Dt,House.Ls_Rent,House.Ls_Utl_Amt,House.Hu_Style_Cd,Building.LHA_ATU,Building.LHA_OPFAC,Building.Hu_Type_Cd,Building.Addr1,Building.City,Building.Hu_Br,Building.Hu_Stat_Cd,(House.Ls_Rent+House.Ls_Utl_Amt),Building.AHA,Ls_Tax_Cd,Lessor.Lr_Lessor1,Lessor.Lr_Lessor2,Lessor.
FROM
(Lease),(House),(Building),(Lessor)
WHERE
Lease.Building_ID∆=∆House.Building_ID∆and∆House.Building_ID∆=∆Building.Building_Id∆and∆(House.Ls_Can_Dt∆>∆#Sept∆30,∆1999#∆AND∆House.Ls_Can_Dt∆<∆#Mar∆23,∆2000#)∆and∆House.Class_Cd∆=∆"L"∆and∆House.Ls_Valid_Ind∆=∆True∆and∆Lease.Ls_Num∆=∆house.LS_num∆and∆Building.hu_stat_cd∆=∆2∆and∆Building.AHA∆=∆"01"∆and∆Lessor.Lease_Id∆=∆Lease.Lease_Id
```

Changes You Need to Make

To make this unique to your AOR, change the following:

- Change **`Building.AHA =`** *your AHA* or delete it.
- Change **`(House.Ls_Can_Dt∆>∆#Sept∆30,∆1999#∆AND∆House.Ls_Can_Dt∆<∆#Mar∆23,∆2000#)`** to a specific date range you are looking for
- If you are an LHO, delete **`AHA`** in **`WHERE`** clause, add the **`Building.LHA_OPFAC`** to the **`WHERE`** clause, and specify a particular *LHA* (for example, **`Building.LHA_OPFAC∆=∆"20115"`**).

Diverted Housing Units

Description

This query provides a listing of leases that were canceled during a specific time period.

NOTE: *The ∆ symbol represents a space.*

```
SELECT
House.Ls_Num,Building.LHA_ATU,Building.LHA_OPFAC,Building.Hu_Type_Cd,Building.Addr1,Building.City,Building.Zip,Building.Hu_Br,Building.Hu_Stat_Cd,House.Hu_Desig_Cd,House.Hu_Devel,House.Hu_Style_Cd,Building.AHA,Building.Diverted_Dt,Building.Diverted_Rmks
FROM
(House),(Building)
WHERE
House.Building_ID∆=∆Building.Building_Id∆and∆(House.Ls_Can_Dt∆is∆Null∆OR∆House.Ls_Can_Dt∆=∆#Jan∆1,∆1900#)∆and∆House.Class_Cd∆=∆"G"∆and∆House.Ls_Valid_Ind∆=∆True∆and∆Building.hu_stat_cd∆>∆4∆and∆Building.AHA∆=∆"07"
```

Changes You Need to Make

To make this unique to your AOR, change the following:

- Change **`Building.AHA =`** *your AHA* or delete it.
- If you are an LHO, delete **`AHA`** in **`WHERE`** clause, add the **`Building.LHA_OPFAC`** to the **`WHERE`** clause, and specify a particular *LHA* (for example, **`Building.LHA_OPFAC∆=∆"20115"`**).

Lease Vacancy

Description

This query provides a listing of vacant leased housing units.

NOTE: *The ∆ symbol represents a space.*

```
SELECT
Building.AHA,Building.LHA_ATU,Building.LHA_OPFAC,House.Ls_Num,Building.Hu_Type_Cd,Building.Addr1,Building.City,Building.Zip,Building.Hu_Br,Building.Hu_Stat_Cd,House.Hu_Devel,House.Hu_Style_Cd,Living_Quarters.Room_Num,Vacancy_History.Start_Vac_Dt,(House.Ls_Rent∆+∆House.Ls_Utl_Amt),House.Ls_Dt,Living_Quarters.Reason_Vacant
FROM
(House),(Building),(Living_Quarters),(Vacancy_History)
WHERE
House.Building_ID∆=∆Building.Building_Id∆and∆(House.Ls_Can_Dt∆is∆Null∆OR∆House.Ls_Can_Dt∆=∆#Jan∆1,∆1900#)∆and∆House.Class_Cd∆=∆"L"∆and∆House.Ls_Valid_Ind∆=∆True∆and∆(Building.hu_stat_cd∆=∆1)∆and∆Living_Quarters.Building_ID∆=∆Building.Building_Id∆and∆Living_Quarters.Room_Num∆=∆Vacancy_History.Room_Num∆and∆Vacancy_History.Building_ID∆=∆Building.Building_Id∆and∆(Vacancy_History.End_Vac_Dt∆is∆Null∆OR∆Vacancy_History.End_Vac_Dt∆=∆#Jan∆1,∆1900#)∆and∆Building.AHA∆=∆"01"
```

Changes You Need to Make

To make this unique to your AOR, change the following:

- Change **`Building.AHA =`** *your AHA* or delete it.
- If you are an LHO, delete **`AHA`** in **`WHERE`** clause, add the **`Building.LHA_OPFAC`** to the **`WHERE`** clause, and specify a particular *LHA* (for example, **`Building.LHA_OPFAC∆=∆"20115"`**).

Lessor Labels

Description

This query provides a report used to generate Labels for Lessors.

NOTE 1: *If you data entry is not consistent among the various records of one lessor, multiple labels will be created.*

NOTE 2: *The* **Δ** *symbol represents a space.*

```
SELECT
Distinct
House.Hu_Devel,Complex.Lr_Cor_Addr1,Complex.Lr_Cor_Addr2,Complex.
Lr_Cor_Addr3,Complex.Lr_Cor_Addr4,House.Ls_Num
FROM
(House),(Building),(Complex)
WHERE
Building.AHAΔ=Δ"08"ΔandΔBuilding.Building_IdΔ=ΔHouse.Building_IDΔand
ΔComplex.Building_IdΔ=ΔHouse.Building_IDΔandΔBuilding.Hu_Stat_CdΔ=Δ1
```

Changes You Need to Make

To make this unique to your AOR, change **`Building.AHA =`** *your AHA* or delete it.

Lease Inventory

Description

This query provides a leased housing inventory.

NOTE: *The ∆ symbol represents a space.*

```
SELECT
Distinct
Lease.Ls_Num,House.Ls_Dt,House.Ls_Can_Dt,House.Ls_Rent,House.Ls_Utl_Amt,House.Hu_Style_Cd,Building.LHA_ATU,Building.LHA_OPFAC,Building.Hu_Type_Cd,Building.Addr1,Building.City,Building.Hu_Br,Building.Hu_Stat_Cd,(House.Ls_Rent,∆House.Ls_Utl_Amt),Building.AHA,Lessor.Ls_Tax_Cd,Lessor.Lr_Lessor1,Lessor.Lr_Lessor2
FROM
(Lease),(House),(Building),(Lessor)
WHERE
Lease.Building_ID∆=∆House.Building_ID∆and∆House.Building_ID∆=∆Building.Building_Id∆and∆(House.Ls_Can_Dt∆is∆Null∆OR∆House.Ls_Can_Dt∆=∆#Jan∆1,∆1900#)∆and∆House.Class_Cd∆=∆"l"∆and∆House.Ls_Valid_Ind∆=∆True∆and∆Lease.Ls_Num∆=∆house.LS_num∆and∆Building.hu_stat_cd∆<∆5∆and∆Building.AHA∆=∆"01"∆and∆Lease.Lease_Id∆=∆Lessor.Lease_Id
```

Changes You Need to Make

To make this unique to your AOR, change **`Building.AHA =`** *your AHA* or delete it.

Owned Inventory

Description

This query provides an owned housing inventory.

NOTE: *The ∆ symbol represents a space.*

```
SELECT
House.Ls_Num,Building.LHA_ATU,Building.LHA_OPFAC,Building.Hu_Type_Cd,Building.Addr1,Building.City,Building.Zip,Building.Hu_Br,Building.Hu_Stat_Cd,House.Hu_Desig_Cd,House.Hu_Devel,House.Hu_Style_Cd,Building.AHA
FROM
(House),(Building)
WHERE
House.Building_ID∆=∆Building.Building_Id∆and∆(House.Ls_Can_Dt∆is∆Null∆OR∆House.Ls_Can_Dt∆=∆#Jan∆1,∆1900#)∆and∆House.Class_Cd∆=∆"G"∆and∆House.Ls_Valid_Ind∆=∆True∆and∆Building.hu_stat_cd∆<∆5∆and∆Building.AHA∆=∆"14"
```

Changes You Need to Make

To make this unique to your AOR, change the following:

- Change **`Building.AHA =`** *your AHA* or delete it.
- If you are an LHO, delete **`AHA`** in **`WHERE`** clause, add the **`Building.LHA_OPFAC`** to the **`WHERE`** clause, and specify a particular *LHA* (for example, **`Building.LHA_OPFAC∆=∆"20115"`**).

Occupant Labels

Description

This query provides a report that can be used to create occupant labels.

NOTE: *The ∆ symbol represents a space.*

```
SELECT
Person.Nm_First,Person.Nm_Last,Building.Addr1,Building.City,Building.Zip
FROM
(Living_Quarters),(Person),(Building),(House),(Tenant_History)
WHERE
Living_Quarters.Building_ID∆=∆Building.Building_Id∆AND∆Living_Quarters.Person_ID∆=∆Person.Person_ID∆and∆Living_Quarters.Person_ID∆=∆Tenant_History.Person_ID∆and∆(Tenant_History.Out_Date∆is∆null∆or∆Tenant_History.Out_Date∆=∆#Jan∆1,∆1900#)∆and∆Living_Quarters.Building_ID∆=∆House.Building_ID∆and∆Building.AHA∆=∆"08"
```

Changes You Need to Make

To make this unique to your AOR, change the following:

- Change **`Building.AHA =`** *your AHA* or delete it.
- If you are an LHO, delete **`AHA`** in **`WHERE`** clause, add the **`Building.LHA_OPFAC`** to the **`WHERE`** clause, and specify a particular *LHA* (for example, **`Building.LHA_OPFAC∆=∆"20115"`**).

Owned Housing Vacancy

Description

This query provides an owned housing vacancy report.

NOTE: *The ∆ symbol represents a space.*

```
SELECT
Building.AHA,Building.LHA_ATU,Building.LHA_OPFAC,House.Ls_Num,Building.Hu_Type_Cd,Building.Addr1,Building.City,Building.Zip,Building.Hu_Br,Building.Hu_Stat_Cd,House.Hu_Desig_Cd,House.Hu_Devel,House.Hu_Style_Cd,Living_Quarters.Room_Num,Vacancy_History.Start_Vac_Dt,Living_Quarters.Reason_Vacant,Living_Quarters.Vac_Rmks
FROM
(House),(Building),(Living_Quarters),(Vacancy_History)
WHERE
House.Building_ID∆=∆Building.Building_Id∆and∆(House.Ls_Can_Dt∆is∆Null∆OR∆House.Ls_Can_Dt∆=∆#Jan∆1,∆1900#)∆and∆House.Class_Cd∆=∆"G"∆and∆House.Ls_Valid_Ind∆=∆True∆and∆(Building.hu_stat_cd∆=∆1∆or∆Building.hu_stat_cd∆=∆4)∆and∆Living_Quarters.Building_ID∆=∆Building.Building_Id∆and∆Living_Quarters.Room_Num∆=∆Vacancy_History.Room_Num∆and∆Vacancy_History.Building_ID∆=∆Building.Building_Id∆and∆(Vacancy_History.End_Vac_Dt∆is∆Null∆OR∆Vacancy_History.End_Vac_Dt∆=∆#Jan∆1,∆1900#)∆and∆Building.AHA∆=∆"01"
```

Changes You Need to Make

To make this unique to your AOR, change the following:

- Change **`Building.AHA =`** *your AHA* or delete it.
- If you are an LHO, delete **`AHA`** in **`WHERE`** clause, add the **`Building.LHA_OPFAC`** to the **`WHERE`** clause, and specify a particular *LHA* (for example, **`Building.LHA_OPFAC∆=∆"20115"`**).

People Address Duty Station

Description

This query is designed to provide an HMIS Occupant listing, complete with address and duty station. It was developed to identify those persons who were still occupied in HMIS but in reality had moved out and transferred to another location.

NOTE: *The ∆ symbol represents a space.*

```
SELECT
Building.LHA_ATU,Building.LHA_OPFAC,Person.Nm_Last,Person.Nm_First,Unit.Unit_Name,House.Ls_Num,Building.Addr1,Building.City,Building.AHA
FROM
(Living_Quarters),(Person),(Building),(House),(Unit)
WHERE
Living_Quarters.Building_ID∆=∆Building.Building_Id∆AND∆Living_Quarters.Person_ID∆=∆Person.Person_ID∆and∆Living_Quarters.Building_ID∆=∆House.Building_ID∆and∆(Person.ATU=∆Unit.ATU∆and∆Person.OPFAC∆=∆Unit.OPFAC)∆and∆Building.AHA∆=∆"02"
ORDER BY
Building.AHA,Building.LHA_OPFAC
```

Changes You Need to Make

To make this unique to your AOR, change the following:

- Change **`Building.AHA =`** *your AHA* or delete it.
- If you are an LHO, delete **`AHA`** in **`WHERE`** clause, add the **`Building.LHA_OPFAC`** to the **`WHERE`** clause, and specify a particular *LHA* (for example, **`Building.LHA_OPFAC∆=∆“20115”`**).

Short Lease

Description

This query is designed to provide a listing of ACTIVE leased housing units with critical data fields; it was designed to be created, exported to EXCEL, lease number formats changed to FINCEN format and provided to FINCEN for validation.

NOTE: *The* **∆** *symbol represents a space.*

```
SELECT
Distinct
Lease.Ls_Num,House.Ls_Dt,House.Ls_Can_Dt,House.Ls_Rent,House.Ls_Utl_Amt,House.Hu_Style_Cd,Building.LHA_ATU,Building.LHA_OPFAC,Building.Hu_Type_Cd,Building.Addr1,Building.City,Building.Hu_Br,Building.Hu_Stat_Cd,(House.Ls_Rent∆+∆House.Ls_Utl_Amt),Building.AHA,Lessor.Ls_Tax_Cd,Lessor.Lr_Lessor1,Lessor.Lr_Lessor2
FROM
(Lease),(House),(Building),(Lessor)
WHERE
Lease.Building_ID∆=∆House.Building_ID∆and∆House.Building_ID=∆Building.Building_Id∆and∆House.Class_Cd∆=∆"l"∆and∆Lease.Ls_Num∆=∆house.LS_num∆and∆Building.AHA∆=∆"01"∆and∆Lease.Lease_Id∆=∆Lessor.Lease_Id
```

Changes You Need to Make

To make this unique to your AOR, Change **`Building.AHA =`** *your AHA* or delete it.

Lease Option Year

Description

This query provides a listing of leased housing, including option year. This query was designed to provide a quick list of leases requiring renewal.

NOTE: *The ∆ symbol represents a space.*

```
SELECT
Distinct
Lease.Ls_Num,House.Ls_Dt,House.Ls_Can_Dt,House.Ls_Rent,House.Ls_Utl_Amt,House.Hu_Style_Cd,Building.LHA_ATU,Building.LHA_OPFAC,Building.Hu_Type_Cd,Building.Addr1,Building.City,Building.Hu_Br,Building.Hu_Stat_Cd,(House.Ls_Rent∆+∆House.Ls_Utl_Amt),Building.AHA,Lessor.Ls_Tax_Cd,Lease.Ls_Opt_Yr,Lessor.Lr_Lessor1,Lessor.Lr_Lessor2
FROM
(Lease),(House),(Building),(Lessor)
WHERE
Lease.Building_ID∆=∆House.Building_ID∆and∆House.Building_ID∆=∆Building.Building_Id∆and∆House.Class_Cd∆=∆"l"∆and∆Lease.Ls_Num∆=∆house.LS_num∆and∆(Building.AHA∆=∆"01")∆and∆Lease.Lease_Id∆=∆Lessor.Lease_Id∆and∆Building.Hu_Stat_Cd∆=∆1
ORDER BY
Lease.Ls_Opt_Yr
```

Changes You Need to Make

To make this unique to your AOR, Change **`Building.AHA =`** *your AHA* or delete it.

People Address Number of Dependents

Description

This query provides a listing of occupants, their addresses, and the number of dependants for owned housing.

NOTE: *The* **Δ** *symbol represents a space.*

```
SELECT
Building.LHA_ATU,Building.LHA_OPFAC,Person.Rank_Abbrev,Person.Nm_Last,Person.Nm_First,Unit.Unit_Name,House.Ls_Num,House.Hu_Devel,Building.Addr1,Building.City,Building.AHA,Person.Num_Dep
FROM
(Living_Quarters),(Person),(Building),(House),(Unit)
WHERE
building.LHA_ATUΔ=Δ"01"ΔandΔbuilding.LHA_OPFACΔ=Δ"36225"ΔandΔLiving_Quarters.Building_IDΔ=ΔBuilding.Building_IdΔANDΔLiving_Quarters.Person_IDΔ=ΔPerson.Person_IDΔandΔLiving_Quarters.Building_IDΔ=ΔHouse.Building_IDΔandΔ(Person.ATUΔ=ΔUnit.ATUΔandΔPerson.OPFACΔ=ΔUnit.OPFAC)ΔandΔHouse.Class_CdΔ=Δ"G"
ORDER BY
Building.AHA,Building.LHA_OPFAC
```

Changes You Need to Make

To make this unique to your AOR, change the following:

- Change **`Building.AHA =`** *your AHA* or delete it.
- If you are an LHO, delete **`AHA`** in **`WHERE`** clause, add the **`Building.LHA_OPFAC`** to the **`WHERE`** clause, and specify a particular *LHA* (for example, **`Building.LHA_OPFACΔ=Δ“20115”`**).

APPENDIX I
REPORT NAVIGATION

Table I-1 Report Navigation

1st Level	2nd Level	3rd Level	4th Level	5th Level	6th Level
Main Menu	Reports	Housing Reports	Leased / Owned / ISSA Inventory Reports	Leased Housing Inventory Reports	
				Owned Housing Inventory Reports	
				ISSA Housing Inventory Reports	
			Leased Housing Monthly Balance Reports	Begin Type Statistics Report	
				End Type Statistics Report	
				Start Statistics Report	
				Stop Statistics Report	
			Complex Reports	List of Complexes	
				List of Complexes Sorted by LHA	
				Letter to Lessor Sorted by Complex	
			Obligation Reports		
			Bedroom Cost Reports	LHA / BR Reports	

1st Level	2nd Level	3rd Level	4th Level	5th Level	6th Level
				BR / LHA Reports	
			Leases Started / Stopped Reports	Leases Started (Acquired During the Month)	
				Leases Stopped (Cancelled During the Month)	
			Count of Leased Housing Units Reports		
			Quick Address Reports	Quick Address Sorted by Address	
				Quick Address Sorted by Last Name	
				Quick Address Sorted by LHA	
			Miscellaneous Reports	InBound Personnel Reports	
				OutBound Personnel Reports	
				All Inspection Reports	

1st Level	2nd Level	3rd Level	4th Level	5th Level	6th Level
				Inspections by Type	
				Maximum Funding Reports	
				Scheduled to Cancel Reports	Leases Scheduled to Cancel Reports
					ISSAs Scheduled to Cancel Reports
				AdHoc Reports	
				Exemptions for Assignment Report	
				Additional Miscellaneous Reports	Inspection Schedule Report
					Diverted Housing Report
					Pending Diversion Report
					Lessor Report
					Census Report
					Weekly Working Report

1st Level	2nd Level	3rd Level	4th Level	5th Level	6th Level
					Available Units for Immediate Occupancy
		Occupant Reports	Detailed Alphabetical by LHO – Leased Housing		
			Detailed Alphabetical by LHO – Owned Housing		
			Detailed Alphabetical by LHO – ISSA Housing		
			Alphabetical by LHO		
			Alphabetical by Last Name		
			Alphabetical by Station		
			Alphabetical by City		
			Memo to CO by Duty Station		
			Listing of DOD Occupants		
		Vacancy Reports	Leased Vacancy Reports		

1st Level	2nd Level	3rd Level	4th Level	5th Level	6th Level
			Owned Vacancy Reports		
			ISSA Vacancy Reports		
			Still Vacant Leased		
			Still Vacant Owned		
			Still Vacant ISSA		
		PERSRU In / Out Reports			
		Waiting List Reports	Waiting List by Type Reports	Leased Housing Applicants	
				Owned Housing Applicants	
				One / Two Bedroom Waiting List	
				Convenience Move Reports	
				DOD Waiting List	
				Holding Reports	
			Waiting List Applicant Statistical Reports		

1st Level	2nd Level	3rd Level	4th Level	5th Level	6th Level
			Scheduled Housing Assignment Reports		
		Claim Reports	Paid Claims Reports		
			Recoupment Activity Reports		
			Claims Pending Reports		
			Reason for Claims		
			Listing of All Claims		
			Reports of Closed Claims		
			Claim Reports Sorted by Lessor		
			Claim Appeals Report		
		Monthly Reports			